3B API Data Projects in Legal Services

April 12, 2022

Christopher Schwartz:

All right. Welcome everyone. Nice to see you folks. It's just about 2:00 PM now, so I think we can go ahead and get started. The lobby is closed. My name is Chris Schwartz and I am a community empowerment advisor with LegalServer and I'm your moderator for today's panel on API Data Projects in Legal Services. And we have an absolutely jam-packed presentation for you with lots of really great projects using API. And we also have two superstars on our panel today here to talk with us. We have Jonathan Pyle who is the contract performance officer at Philadelphia Legal Assistance. He's also the developer of Docassemble, which some of you may have seen in action at this very conference in which some of you might even already be using for things like online intake interviews and document assembly. And we also have Mallory Curran who is an attorney and a highly sought-after national tech consultant, as well as senior advisor to the National Center for Medical-Legal Partnerships.

So, some of you who came might have been attracted by the title and might be well aware of what an API is, but before we get started today, I thought I would do a very rudimentary introduction for those of you who might not be fully aware. I might think you're aware, but maybe aren't. API stands for application programming interface. And it's really just a protocol that disparate programs can use to send information back and forth. And some common examples there that you see on your screen are address verification when you put in your address for an internet order and you get back a message saying, "Don't you really mean this address? Isn't this actually the ZIP code you mean?" That API is queried the US Postal Service in many cases there or Google Maps itself. Also, when you sign into an application and it asks you if you want to sign in using your Google account or your Facebook account, and that's another common example that you might have run into.

And I also thought I would do a very sort of brief demonstration of what it kind of looks like to use an API on the backend. We have a tool here, a website called “REST test test.” REST is an API protocol, a type of API. And this is a little application that will let you access public APIs so that you can kind of test them in the background and see what they do. And one public API that you might be familiar with, at least the program behind it is iTunes. The iTunes search is available by API. So, using this application here, we're going to pick the post action. We've got different actions, different ways to interact using API here. Post is going to send data to our API endpoint here, and now we're going to have to add some parameters here. Parameters are the variables, the parts of the data that are important that you want the other program to pay attention to.

And they're usually very specific based on who you're communicating with. Here for Apple iTunes, term is going to be defined as the artist or the performer that you want information about. And we're also going to add in the entity variable and the entity here is the kind of media that you want, that you want to search for, that you want to look for here. And here, we'll look for music videos by the B-52's. And I'm going to make my request here. I'm going to get back a whole lot of information, you saw how quickly that was to process here.

And the way that information comes back in API has to be parsed, has to be sorted through, which is something that you can have your program set up to do here. But rather than doing that, we're just going to quickly look for one of the results here. And we can see that Love Shack was returned, a music video by the B-52's. Who doesn't love, Love Shack? So very quick demonstration there. And now I'm going to turn it over to Mallory Curran who's going to walk with us through some projects that have application in the legal services space. And, Mallory, do you want me to run your slides?

Mallory Curran:

Yeah. If you could go to the next slide, that would be great. As Chris said, I'm Mallory Curran. It's really nice to be here with you today. I am a consultant focused on legal services, medical-legal partnership, and technology. I'm also somebody who lives in Brooklyn. So, I just wanted to put today in a little bit of context. I know that a lot of people on this call live in Brooklyn or have loved ones who live in Brooklyn and wanted to acknowledge the subway shooting that happened this morning. And my child's school was in lockdown and there's been helicopters flying all over. So, just wanted to acknowledge that, that it's a difficult day and that we're keeping the people who were the direct and the indirect victims of the violence in our minds, both in Brooklyn and throughout the world. And really keeping the victims of all violence in our minds.

And that sort of brings us back to why are we here today? Sometimes it can be hard to concentrate on something that feels two steps removed from things that are really important, but we know that exchanging data actually is very important. And of course, what we do matters. And I just want to acknowledge that what we're trying to do here in this panel, and really what this conference overall is to try and leverage data and leverage technology to streamline the work that our on-the-ground advocates are doing every day alongside and behalf of our client communities. And what we're really trying to do with APIs is we want our advocates just to be able to do their work as effectively and as efficiently as possible, and have all of the tools at their fingertips that they need to effectively assert the rights of their clients.

So, some big picture and small picture context setting for us today. I'm going to talk about two different projects that I've been fortunate enough to be involved in. One of which is ongoing and has to do with New York City and Open Data. I'm going to talk about that first. And then after Jonathan talks through some of his projects, I'm going to come back and talk about a medical-legal partnership focused project, and sort of put that in the context of using API to share data between some of our trusted community partners and our own legal services programs. So, Chris, if you can go to the next slide.

So, I'm going to start by talking about using NYC Open Data to benefit tenants and tenant advocates. If those of you on the call who have been to previous New York State legal services technology conferences in the past, some of this may be familiar or on phase four of what we've been trying to do to leverage the NYC Open Data. Next slide please.

So, New York City does a lot to make a lot of data available for free through their Open Data site. A lot of municipalities have been doing this and there's more and more happening every day. So, if you're practicing outside of the New York City context, I encourage you to kind of

look around and see what you can find. One of the greatest things from our perspective about New York city Open Data though, is how easy they make it to set up an API. So, Chris, if you can move forward.

So, if I click in on a data set and NYC Open Data that's important to me like housing maintenance code violations. You can see there, there's a button that I can click on that's called API. And it basically gives me all the information that I need to set up a query in LegalServer. So, that's extremely handy. And if you don't have that for your municipality or your jurisdiction's Open Data site, I would encourage you to reach out to the folks who run those sites and talk to them about whether and when and how they're going to make API related information available to you, because that's really an important key in making their Open Data actually usable to the people in the community. Next slide please.

So, there's just a treasure trove of information that's available for free. From the Open Data, we looked already at the housing maintenance code violations. There's also multiple dwelling registrations, which include lots of important information including who owns the building and whether the registration is expired or where it's supposed to be. There's also litigation from the Housing Preservation and Development, including tenant actions, heat and hot water actions, false certification of non-lead and so on.

We can also find things like previous evictions from a building, just to note, that's not eviction filings, but it's people who're actually evicted as well as vacate orders. And there's a number of different sites that make a lot of that data available in New York City, which is good, but it also means that our advocates, they don't have a lot of options for one-stop shopping that they have to go to a lot of different places to find the key information they need to figure out what defenses are available for them to assert on behalf of their clients. So, we've had two previous phases of this project. Again, if you've attended these conferences in the past, you may have heard us talk about these, but they're important to talk about what we're doing today. And I know we also have some new folks on the phone. So Chris, if you could move forward.

We worked in partnership with LegalServer and a New York city based non-profit called Who Owns What to set up what's called an iFrame within a LegalServer case to pull in sort of a real time picture of what's happening with the building. So 3915 Carpenter has a lot of things going on with it, which is why I like to use it as an example, so you may see some other data points pulled in from there. So, this is great and gives a snapshot, but it's just something we can look at. The data is not stored in the LegalServer case. It's not stored in case notes. It's not something that we can report on. So, it got us a lot of the places that we wanted to go, but it wasn't where we wanted to end up. So, we continued to work and think about, "Okay, how can we supplement and complement the option to have Who Owns What data pull right into my legal case with other more structured data?" So, Chris, if you can go one more.

One of the things that we did sort of at the same time as the Who Owns What thing was pull in data into case notes. So, this is an example. AEP is the Alternative Enforcement Program, which really troubled buildings with a lot of housing code violations and other problems end up in the AEP, Alternative Enforcement Program. So, you can see kind of what it looks like down in the case note, which it's handy to know. If I'm working on a building and I can see that data came

back and it's involved in the AEP, that's important, but it's a little bit harder to read if I want the details of what's going on with that building.

So, one of the things that we wanted to do with this next phase of the project was make it so that the data came in a structured way, not just in the case note, but in something that I could look at and my brain could understand it more easily and that I could also run reports. So, for example if I wanted to see all of the open cases at my organization that had ever been involved in AEP, if I was pulling the data in a structured way, then I could run a report like that. So, I'm going to go ahead and start to share my screen. And I'm on a Mac and Teams doesn't always love Macs. So I actually am going to be coming in and out of what I'm trying to look at here. So, if you can bear with me, I'll really appreciate it. Okay. And Chris, if you can't see that, will you let me know?

Christopher Schwartz:

I can see it.

Mallory Curran:

Okay, great. So, just before we were looking at this AEP information in a case note, and it was a little bit... I'm going to extend my login. And it was a little bit hard to read, but you can see now when I have it pulled in structured data, the date looks easy. I can see the date that it started in the AEP when it was discharged, what round it was in and so on. So, you can also imagine that these could easily be turned into columns in a report that I wanted to run. So, that was one important step forward that we made in particular with LegalServer. Now, we're able to pull in data like AEP information, some other registration information, things that don't change that often, we can bring those into fields in LegalServer. The next thing that I want to show you was our next challenge.

That was one thing to be able to pull in. Okay, there's one AEP start date. There's not multiple AEP start dates, but there are multiple housing code violations for one building. And so that was the next trick that we were trying to figure out with LegalServer. How can we pull in multiples of something and not just the single one? So hold on one more second here. Here we go. This is actually showing another example of multiples. This is HBD Housing Preservation and Development litigation data for the building. So, you can see that multiple litigation against the landlord has been filed in the past here. It's been filed, you can see who it was filed against, whether it's pending or closed? You can also see over here and this one, there weren't particularly a finding of harassment or a penalty, a financial penalty. But in other cases that we look at, you can see that, yes, there's been a finding of harassment or that there's been a financial penalty leveled against the landlord.

So, we were able to do this not just with litigation history, but also with building eviction history, seeing who has been, or whether people have been evicted from the building. Again, not just eviction filings, but actual evictions as well as with housing code violations. So, I'm going to stop sharing again for a second and try and pull up the housing code violations.

Christopher Schwartz:

And two-minute warning, Mallory.

Mallory Curran:

Okay, great. Okay. This has been a little tricky for me. Oh, here we go. All right. Sorry. It only wants me to choose one tab at a time and I have my tabs super well organized, but not for Teams. Okay. So, here's a similar example, but with housing code violations. So, even when there's multiple housing code violations for building, you can pull all of them into this report that you can pull in and look at directly from the case. The other reason that I wanted to show you, the housing code violations is that this is still a work in progress, but we're hoping in just the next month or two, we'll be finished with our testing and launching this with our really great colleagues at Mobilization for Justice and TakeRoot Justice where it will actually update. So, we're able to pull in, if you run the API again, it would take a look and it might tell you, "Okay, this one is now closed." Or, "There's a new violation status." Or, "There's new dates related to the violations that have been sent out."

And we've set it so that it's only showing open violations, but we could set it so it open C violations, which are more serious violations, but we could put on different filters as well. So, we're really excited about this. We think that having this one-stop shopping for colleagues who are tenant advocates is going to be incredibly useful for them. Again, not to replace the Who Owns What snapshot, but really to supplement it. And once we have the framework set up and ready to roll, the next phase that maybe we'll be talking to you about next year is using this data and the guided navigation feature in LegalServer in order to flag cases where something is wrong. For example, maybe the multiple dwelling registration has expired and we could set it so that it flags for you that that happens. It flags for you if the building is involved in AEP. It flags if we think that the tenant might be eligible for the Senior Citizen Rent Increase Exemption or SCRIE.

So, we're excited about the structured data for the advocates in their day-to-day work. We're looking forward to building important reports that help you identify trends. And then we're looking forward to building workflows that will help identify cases and potential defenses that might otherwise fall through the cracks. So, I'm stop sharing-

Christopher Schwartz:

Thank you, Mallory.

Mallory Curran:

... Yep and hand it back to Chris and come back later in the session.

Christopher Schwartz:

Yep. As a housing advocate, I can't express to you how exciting that is. And Jonathan, you are up now. Screen is yours.

Jonathan Pyle:

Okay. So, I work at Philadelphia Legal Assistance where I am an attorney, but also I happen to know how to code, so it's very useful to have me around to code various things. So, I'm going to run through some examples of things that I've created over the years that have been beneficial to our advocates on our mortgage foreclosure hotline and another areas. And I want to sort of get your imagination going about how you might want to use APIs in your work, and also feel free to ask questions in the chat. Hopefully the chat's open if you have questions for myself or Mallory.

So, the first example is kind of similar to Mallory's, but it involves PDF files. It is an example involving automating the research that we would normally do when we're doing a foreclosure intake. We can go to actions in LegalServer and then click fetch documents. And then this little screen comes up that says, "When you press continue, documents relating to the property will be emailed to the case file. It may take several minutes." So, what this is doing is calling an API that I wrote that is running on one of my computers. And that API is going on to several different websites and downloading PDFs, doing screenshots of things and assembling a whole bunch of PDF files that the advocates might want to use when working up the case, including the mortgage documents from the registry of deeds, so you can see what type of mortgage people have. Look at the latest deed to see that, "Oh, it looks like this latest deed was some type of quick claim deed."

It gives you a PDF, a kind of a screenshot of the registry of deed's listing of all of the property transactions involving the house. It goes on to the city's website and screenshots the current real estate tax balance, showing that this person owes $1,300 in taxes. So, all this information is available to the advocate, but it's also logged in the case notes so that we have it in the future. Another thing that it does similar to Mallory's website that she had in an iFrame is it takes a Google Street View photograph of the house and puts that in a PDF in the case file. And I just wanted to illustrate how, even though this is like a kind of a cool thing to just be able to see what the house looks like, see is it falling down? That's pretty relevant.

The Google Maps API is actually very simple to use. This is a screenshot of just Chrome. And all I'm doing is visiting this website without having logged in, maps.googleapi.com/map/api/streetview and then there's a size. I decided to pick 640 pixels by 640 pixels square image, and then location 123 South Broad Street in Philadelphia. The only code I've been doing here is replacing spaces with plus signs. And then after that, there is a key, which is an API key. When you have an API, you sometimes have to prove who you are because Google doesn't want just any old person using their street view API. But just by visiting that URL in a web browser, you can see a picture of a property without doing anything else. And that's what the program does on the back end.

To start using Google APIs, it's actually pretty simple. You just go on to cloud.google.com and log in, give Google your credit card number and it'll give you an API key like this that you can start using in calling APIs. And there's a great deal of stuff that you can do with Google. Like it'll do optical character recognition on your documents and things like that. So, very powerful. If you want to know more about how APIs work, by the way, I did a presentation at the Innovations and Technology Conference that the Legal Services Corporation put on in 2021. You can find that on YouTube, under LSC ITC APIs.

So, it goes into some really gory detail about how APIs work if you're interested. So the way that I've implemented this API is using LegalServer's external API block. And so, it was kind of like the thing that Chris was demonstrating earlier, where he was doing the iTunes API. I parsed in the API key. I parsed in the user's address, the email address of the advocate and the case ID of the LegalServer case. And then my API that I wrote that said docket.philalegal@org/fetch, did all the rest of the work and emailed stuff into the case file. But as far as LegalServer configuration, it's very easy to set this type of stuff up. And so my second example also involves automating research where I'm using an API to summarize information and put it into a case note. And just in case you think this presentation is very LegalServer specific, well, kind of it is because Mallory and I both use LegalServer, but I actually wrote this code when we were using Kemps.

And it started out as a Kemps integration and I just migrated it over to LegalServer when we switched. So, if you press for closure docket info, while you're looking at a case note, it says, searching... And then what it does is it goes on to the court's website and pulls down the most recent docket for any addresses associated with the client. And then it pops some information into the case note. So, if you then look at what that case note is, it's a summary of court cases kind of like Mallory's, it was a summary of code violations. I'm summarizing court cases, and there's one old one that's probably not relevant, but here's one from 2022. It shows the parties to the case when the complaint was filed. And when you're using APIs, you can have the computer do all sorts of math for you, so you don't have to think about it yourself.

So it says, "Well, how much was the complaint for?" They wanted $43,000. And then I broke that down using amortization, like if they were to pay that amount back at 2% interest, that would be $133 a month. And that would be 9% of the person's income. So, it just kind of automates something that the paralegals might be thinking about while they're talking to a foreclosure client on the phone, it also computes the nearest housing counseling agencies to the person's home. You can do anything with code, it's pretty nice.

So, another example is integration with our phone system. We recently migrated to a new phone system called Dialpad, which is kind of cool because it has text message integration built in, and our advocates are constantly using text messaging to communicate with their clients, but all the conversations take place in this Dialpad app, but our advocates really, really wanted these communications to be logged in LegalServer. Well, one of the reasons we picked Dialpad was because they had a very robust API. And so, I was able to use the Dialpad API to get it to talk to a computer that then talked to the LegalServer API, which has a phone API that's built for this type of purpose. So, what happens is if I were to send a text message to a client Alexandra saying, "Hi, Alexandra, this is Jonathan from PLA, how did it go at court?" Automatically, it would log that as a case note in LegalServer because LegalServer has an API for making a case note.

And then if the client were to respond by texting me saying that the judge gave her a temporary order and then took a picture of the temporary order, it's nice that I can look at this document in dial pad, but I really wanted it in LegalServer. And so, LegalServer also logs the response that the client gives and attaches their photograph as an attachment to a case note. So, it's kind of like automatically creating a record, even though this is a completely different phone system,

unrelated to LegalServer. Another feature that I integrated with Dialpad was screen pop, so that if an advocate is sitting at their desk, and then they get a call from someone that they don't recognize the phone number, but the Dialpad system sends the phone number to LegalServer, sees if there are any cases associated with that phone number and then automatically pops up on the user's screen, the LegalServer case file.

So, it saves the paralegal time of looking it up saying, "Who's this person who's calling me?" If they've called before, it will pop up their file on the screen. And it was a little bit freaky when I first implemented that people were like, "Why is my screen suddenly doing this?" And I don't have a demonstration of that because I couldn't get it to do a video. So, another example is integrating with Docassemble, which is a guided interview platform. So one of the things my family law unit wanted to do was very easily get retainer agreements and citizenship attestation signed by the client in a family law case. And they had a standard retainer that they used. And so, I set up this thing using the API that Docassemble provides in LegalServer where you click generate link to give to client to fill out specific forms. You click that link. And then it plugs in this information into the page, which are basically little messages that you can copy and paste into either text message or an email to a client.

And you can customize them as you want. But inside of this little communication is a link that the client can click on that goes to our Docassemble site at PLA. And so when the client receives that message and they click on that link, they go to this site that tells them what the text of the retainer agreement is. And then they can sign their name with the touch screen and then when they submit that, the retainer and citizenship attestation are automatically copied into the LegalServer case file, so the advocate doesn't have to remember to do that. All they have to do is send the client the link and then make sure they've signed. So it's kind of like a DocuSign integration, but it's all nicely integrated with LegalServer. So, it's less things for the advocate to think about.

So, my other example, I think this is my final one is synchronizing a public website to LegalServer. I don't know if anybody here does pro bono work, but our sister organization, Philadelphia VIP here in Philly, they are the pro bono coordination agency and they like to have a case listing of available cases on their website, but they were spending lots and lots of staff time keeping this updated manually. And so they asked me if there was some way to have their WordPress website talk to the pro bono opportunities API that is offered by LegalServer. And so, I very nicely wrote them some code which actually wasn't that hard and to add to their WordPress site. And this is just a screenshot of the WordPress code and it calls their VIP legalserver.org pro bono opportunities API asking for up to 1,000 records. And then it updates the content on the website on the basis of what's in LegalServer so that this page is always automatically updated without their staff needing to spend any staff time worrying about which cases are taken, which cases aren't.

They update it all in the single source of truth, which is their LegalServer case management system. So, those are just some examples of things that you can do. Now, unfortunately, a lot of this is like demonstrating the fact that I know how to write code. And so, the struggle for you, if you have an idea is, "Well, who do I find to write the code for me?" And unfortunately that's something that I don't know much about because I write all my code myself, but there are

definitely people who are available to do coding, so you can maybe find them in the chat right here. Sam Harden just posted, Sam Harden knows how to code. So anyway, hopefully that gave you some ideas of things that you can do at your organization. And I'll turn it back to Mallory.

Mallory Curran:

Great. Thank you, Jonathan. And Chris, if you can pull the slides back up, that would be great.

Christopher Schwartz:

Sure.

Mallory Curran:

I'm always very, very impressed by everything that Jonathan does and honestly, a bit intimidated by the things that Jonathan does. So, I also want to say that I have no tech training and I don't refer to myself as self-taught because a lot of people taught me things, but I never learned anything in a formal way. So, if you're sitting here thinking like, "If I want to be like Jonathan Pyle, I need another two years." Maybe you do and you should move towards that totally, but there's also things that you can do now, even if you're not Jonathan Pyle level skilled.

So, everything that I showed you with respect to the New York City Open Data earlier in this session, I was able to set up on my own with minimal support from LegalServer and I failed to say at the end, is that the next steps for that is once we finish the build out and test it with Mobilization for Justice and hopefully TakeRoot Justice, then we'll be making it available with instructions to the other programs in New York city so that their administrators, even if they're not coders are able to implement that into their system.

Okay. So, the next project that I'm going to talk about doesn't have anything to do with LegalServer. So this is a closed loop referral system for a medical-legal partnership. And the legal case management system involved in the program was Pika. And it was used by Iowa Legal Aid and we built it along with their partner, Siouxland Community Health Center. So many of you, whether you have a medical-legal partnership or not, you probably have some really close, trusted community partners that you work with all the time and who make referrals to you that you wish they could make in a more streamlined way. And that they may also wish to know like, did they successfully get the person they're working with to receive help from you as a legal program? So, that's what we set out to do with this Iowa project. Chris, if you can go ahead and advance, that would be great.

Unlike the New York City project where really just like a handful of people can get input from advocates and then really run with it, a project like this, where you're working with trusted community partners, you really need to trust them and you really need to work together. So you have to have willing partners at the table. This was through a technology initiative grant that was awarded to Montana Legal Services. So, as you can see there, we had a number of partners both inside and outside the legal realm. Next slide please.

So, you don't need to read this workflow, but you need to learn to love workflows if you don't already love them to understand how you want data to flow back and forth, especially if you want to build what's called a bidirectional API, where information is flowing in both directions. The important thing for you to know on here is that the purple rectangles are things that the healthcare clinicians were doing. And then the orange rectangles are things that the Iowa Legal Aid staff was doing. So, you can see that healthcare worked on their own for a while and then they'd hand things off to the legal partners who would then get stuff back to the healthcare team, hand it off back to the legal team and so on. Next. I could talk about this for like hours. I'm not going to do that, but I am going to put the link to this in the chat right now.

So, if you're really interested in this, or even just a little bit interested in it, I encourage you to follow the link and you can get this case study that really walks you through step by step what we did. Next slide. Okay. This was a three phase project. Next slide. The first one was helping our healthcare partners screen for unmet legal needs. So, this is actually a screenshot from their electronic health record and we gave them questions or Iowa Legal Aid gave them questions that they felt would elicit answers and identify people that they at Iowa Legal Aid could help. Next slide.

We had these general questions, like, "Are you having trouble accessing health insurance benefits?" But then if the clinicians clicked on that question mark, which is to the left of every question, there are about 20 questions in total, we gave a little bit more information about how a patient might describe this. So, the healthcare providers really asked for that and really liked having some backup, because they didn't always know how to ask a question or if the patient had a follow-up, this helped them determine whether the patient really wanted to say yes or no. Next slide.

And then the other thing happened is that if somebody says yes to one of these screening questions, these check boxes that pop up are linked with LSC problem codes, legal problem codes. So, if somebody checked off bankruptcy, we wanted to know that that was going to be a zero one legal problem code for bankruptcy. So, we were planning ahead to make our mapping easier for that bidirectional data flowing back and forth. Next slide please.

So at the end of our first phase, a piece of paper was created, literally printed out and then literally faxed over to Iowa Legal Aid. And it was better than what they had before, because it had more information for the legal team and it also started collecting data in a structured way in the electronic health record that we could run reports on later. Next slide. But what we wanted was life to be easier for the healthcare staff, they're super busy and it was a really big administrative burden for them not only to go through the whole screening, but also then to, as I said, literally print out the referral and then literally fax it over to Iowa Legal Aid. So, we wanted to make it so that at a click of a button with the patient's permission, they could send a referral that would go right into Pika. Next slide.

So, that we're back on that workflow, back in a purple section, next slide. And they would literally click a button, document that they have seen consent from the patient and then “bing” over at Iowa Legal Aid in their online intake system through Pika, they would then see that a case had come in. Next slide. So, this source, it looks a little funny, but that says MLP. So their A2J was just sort of regular incoming online intakes for Iowa Legal Aid, but they could

differentiate the MLP ones. Next one. And then here you can see, they could do a conflicts check for Ted Lasso, who's the incoming client referred by the healthcare partners and move on again. And then all that information that used to be in the paper that was faxed over to them now goes into a case note. They can see who made the referral, the language of the patient, the health insurance that they have and what screening questions they screen positive for, said yes to? Next slide.

Then the phase three that we wanted to do was to let the healthcare team know, in fact, we either reached your patient or we never reached your patient. So, the next phase was to figure out how to get the data back from Iowa Legal Aid. So next slide. If you go, and if you look in our PDF, you'll see more information about sort of how the data was mapped and exchanged back and forth. Next slide, a little close up there, if you're really interested in this, you can come back and look at it again. Next slide.

A document was created, a document template in Pika so that when data was sent back over to the healthcare partners, so the Iowa Legal Aid staff would know what data was sent over, so you see the template on the left and then a completed information there for Ted Lasso on the right. Next slide.

And then when the data came in both about whether they connected with the client or not, but then at the end of the case information about what happened when the case was over with the level of service, was it extended or brief service? Did they prevent an eviction or so on? So, this is just one of the views in the electronic health record system that the healthcare team could take a look and see what happened with their patient's case. And again, we had a trigger on the Iowa Legal Aid side that the client had to consent to their data being sent back before the API was functional. If that wasn't checked, then the API would not work. Next slide.

You can tell, we were really into our workflow. If you work with healthcare partners, they really are into workflows. And so that's how we got to the end, the last purple slide, where the staff could see the data. So, especially in the health world, but other places too, this whole concept of closing the loop on referrals is huge. There's really a push for people not just to make referrals, but to confirm that the people they're trying to help are actually getting the help that they wanted for them. And this was a really, really important step forward in the medical-legal partnership world to show that we could create a functional closed loop referral system, sending data back and forth between two trusted community partners. So, we're looking forward to expanding this, hoping to find projects where we can do this in other electronic health record systems. This was Athenahealth.

We'd like to go into say Epic, which has a really big market share. And then also expand into other case management systems, LegalServer, JusticeServer, and others. But it was really exciting, a lot of fun, but you do need somebody like Jonathan on your team to make something like this happen. You can't just be a novice like me and do it on your own. Back to you, Chris.

Christopher Schwartz:

Ooh, I was on mute there. Thank you folks so much for sharing the projects with us and giving us an idea of how APIs can be employed in our practices. We're going to open it up for

questions in just a second, but I did mention in the chat that we do have a slide of resources here and the slides will be made available to you. Insomnia is sort of a platform that we use for testing APIs in LegalServer. I think other folks do as well. We have what's called the big list of free APIs, perfectly apropos for Simon's question in the chat. So thank you for setting that one up. And then we have for LegalServer for programs that use LegalServer, we have a very well kept set of API documents to help you get started. Mallory and Jonathan both mentioned that for some extended uses or some innovative uses of API, having someone like Jonathan who knows how to code is going to be integral and vital.

But what we're finding is that there are programs out there that are putting together pretty good sets of API documents for novices like me, for people who are starting out like Mallory was a year or so ago to help you get started as well. And we're going to open it for questions now, but I'm going to steal moderator's privilege and I think I'm going to ask a question here and I'll open it up to the both of you. Would you say that API accessibility when you're looking for a program, when you're part of a legal services office and you're looking to update, let's say a customer relations management program or some other program that you would use, do you look for API accessibility? And if the answer is yes, how vital is it for the program that you're upgrading to, to make itself available to API uses?

Mallory Curran:

I'll go first. I think it's hugely important and it's only going to become more important over time. I'll give an example from that medical-legal partnership MLP project that I talked about. We had planned to do the same thing in Montana, but the electronic health system that was used by the Montana health centers was not up for it. It wasn't going to be an easy lift. It was going to be a heavy lift. And honestly, they were not a willing partner. And so we actually had to forego that part of the project, not because the legal tech wasn't there, it was. The healthcare tech was not there. So, I think it's enormously important. And as more and more places are opening up more and more data, the whole concept of interoperability and trying to streamline all the different programs you're using into one place that's easier for your advocates, I think it's incredibly important.

And I've said this, and this will maybe be the third time I've talked about it, but willing partners, just because somebody has the technology and could do it doesn't mean that they're easy to work with. And so, the Iowa team, I have to say they were wonderful to work with. And I've worked on projects with people where it was a lot harder and it's really hard to move forward if everybody's not invested and has sort of a similar end game in mind.

Jonathan Pyle:

Yeah. An API is definitely a big plus factor in any type of vendor that we look at, but you don't need to sit on your hands and wait for an API to be developed. You can always get around it often by using web scraping where you automate exactly what a web browser does like going to a site, doing a search, logging in, whatever, and yanking the information out with brute force. It's actually not massively complicated. An API is sort of a simplified user friendly way to do

that, but one can write code to get around that if there's no way that your court is ever going to build an API.

Christopher Schwartz:

And even given that, would you say that it would be important or determinative when you're picking a new program or is the ability to write some web scraping program simple enough that you wouldn't give it another thought?

Jonathan Pyle:

Well, it was definitely determinative when we switched to our new phone system, because if I couldn't get the text messages to sync, there's no way our advocates would stand for that. So, yeah, we definitely paid extra so that we could have the API ability.

Christopher Schwartz:

Gotcha. Thank you. And Simon has a question in chat, "In the legal industry, is there a clear API schema standard that are being used or is it still the Wild Wild West with multiple proprietary data schemas?"

Jonathan Pyle:

Well, maybe in the healthcare world, there are all sorts of crazy schemas, but I found that it's pretty simple these days. You just look at their documentation and it's like some JSON object and it's fairly self-explanatory. So schema, I don't really worry about schemas. Everything's like a REST API, even if it doesn't call itself that, it's typically very easy to use. Much better than 15 years ago when there were web services using SOAP and you couldn't make heads or tails of how to use it.

Mallory Curran:

And my experience, which mostly is as a liaison facilitator in talking about it, when I get the right people in the room, then they have like a two-minute exchange and they're like, "Yeah, that makes sense. Okay, yeah, let's do that." Like, "Let's do the most straightforward thing that's going to protect privacy appropriately." And it's like they just need to find each other, have the two minutes of conversation and then they're able to move forward. And then I also saw a question. I know we're coming up on time here about sort of filtering and that kind of stuff. And I just wanted to mention that the LegalServer API and the guided navigation that I showed that pulled in multiple housing violations or HPD litigation or whatever uses JQ filters, which I am excitedly learning about, but is definitely next level, not totally simple, which is part of the reason that we want to scale up throughout the city in a way that's as straightforward for people as possible.

Christopher Schwartz:

Got it. Thank you both. Any other questions? We're just about closing in on the final minute here, so throw them into chat. If you don't get to ask your question, but you do have one,

please feel free to reach out to us. Our contact information is on the screen. Thank you all for joining us. And we put this together because we have a justice gap still in the United States and we will for the foreseeable future. And the whole reason for this conference is using technology to narrow that justice gap. And if we can move some of the obstacles of direct services out of the way by automating things, by pulling in information that might otherwise take, whether it's minutes or hours for an advocate to get access to directly into the case file, then that's more time that we get to serve our clients directly. So, thank you for joining us. Dream big, ask questions, and we'll see you at the rest of the conference.

Mallory Curran:

Thanks so much.

Christopher Schwartz:

Bye everyone.

Mallory Curran:

Bye-bye.

Christopher Schwartz:

Thanks, Jonathan. Thanks, Mallory.

Mallory Curran:

Thank you, Jonathan. Thank you-