

Help-Seeker Intake Tool Interim Evaluation

A review of our online intake tool
to inform our second iteration

May 2019

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Our Justice Connect Innovation Team

Jo Szscpanska

Today Design

Pretty Neat

Our member law firms

Report author:

Kate Fazio

Head of Innovation and Engagement
Justice Connect
T +61 3 8636 4447
kate.fazio@justiceconnect.org.au

Justice Connect

PO Box 16013
Melbourne VIC 8007
DX 128 Melbourne
T +61 3 8636 4400
F +61 3 8636 4455
justiceconnect.org.au

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Executive Summary

Justice Connect's Gateway Project commenced in 2017, aiming to improve the way we interact with stakeholders online and offline. As a complex organisation working with many stakeholders, we knew there were opportunities to simplify and streamline the way we worked to benefit everyone involved in our services, including our staff and the people we help.

This Report provides an interim evaluation of Justice Connect's Help-Seeker Intake Tool developed through the Gateway Project. It sets out the development process, evaluation methods and findings, and makes recommendations that will inform the second release of the intake tool. Our full list of insights and recommendations are contained in the next section.

The key insights gained through our research and evaluation are:

1. Help-seekers are increasingly finding and engaging with us online. With little promotion, use of the online intake tool is increasing. Our new website has overall increased traffic, and our Help page is now our most popular page (it used to rank very low).
2. Certain areas of the intake tool cause difficulty for help-seekers. In particular, help-seekers struggle to self-identify the category of their legal problem if presented with a long list of legal issues. The income and assets test in the tool is noticeably more difficult for help-seekers than other steps.
3. Programs that have invested more in developing online intake question flows that represent the entirety on the intake process have improved conversion rates and efficiency gains from the tool.
4. Many help-seekers have a preference for using online channels to seek legal assistance.
5. Many people with legal problems struggle to find any appropriate legal assistance and their legal problems remain unresolved months after unsuccessfully seeking assistance from Justice Connect.

Our key recommendations flowing from this evaluation are:

1. Refine intake questions with Programs to ensure that our online intake process covers all information required to assess eligibility to improve help-seeker experience and increase efficiency gains.
2. Invest in design and functionality to improve user friendliness and simplify information provision.
3. Conduct further research and prototyping to address the issue of how help-seekers can self-identify the category/ies applicable to their legal problem.
4. Build referral pathways in the tool to our own self-help resources and to other organisations, including where possible deep integrations with other services.
5. Increase marketing and promotions via digital marketing campaigns to connect directly with help-seekers who are likely to be eligible for our services.
6. Conduct promotion campaign with sector peers to build knowledge around our online intake pathways.

This Report is being released publicly in the hope that it can assist other organisations considering implementing online intake or evaluating their own online intake systems by providing insights and recommendations based on our particular product and setting.

This Report has been prepared by our small team, and is not intended to meet scientific or statistical evaluation standards. Where we believe a valuable insight can be gained from our data and evidence, we have set out our views. We encourage debate on the interpretation of our data and welcome feedback.

For more information on Justice Connect and our Gateway Project, please go to www.justiceconnect.org.au/digitalinnovation. If you have specific feedback on this report, you can contact its author, Head of Innovation and Engagement, Kate Fazio, at kate.fazio@justiceconnect.org.au.



Summary of insights

Help-seekers are finding and engaging with us online

1. Help-seekers are increasingly finding and engaging with us online. With little promotion, use of the Online Intake Tool is increasing. Our new website has overall increased traffic, and our Help page is now our most popular page (when it used to rank very low).
2. 66% of surveyed help-seekers indicated a preference for applying for assistance online over phone-based applications.
3. Those engaging with us online are more likely to be between 25 and 45 years old, female, and in Victoria or NSW.
4. Help-seekers are using our online channel to apply for assistance outside of business hours and on weekends and public holidays.
5. Many people with legal problems struggle to find any appropriate legal assistance and their legal problems remain unresolved months after unsuccessfully seeking assistance from Justice Connect.

The intake tool works well, but there are areas that can be improved

6. Help-seekers like the look and feel of the online intake tool, both on desktop and mobile. Even those who have difficulty using the tool indicate that they would be likely to recommend it to a friend or family.
7. Certain areas of the intake tool cause more difficulty for help-seekers. In particular, help-seekers struggle to self-identify the category of their legal problem.
8. Help-seekers are regularly encountering difficulty completing the income and assets test step and staff are noticing low quality data entry at this step.
9. Testers indicate that being notified that Justice Connect cannot assist is disheartening, but willingly engage with referral suggestions, which indicates that investing in these referral suggestions is valuable.
10. Staff and help-seekers indicate that they can feel unsure of where they are in the intake journey while in the intake tool.
11. Staff believe the backend interface could be enhanced to improve navigability and distinguishment between different information.

Online intake works for some but not all

12. When testers were experiencing serious mental health problems and/or were using substances at the time of user testing, this negatively impacted on their ability to engage with online tool, their tolerance for experimentation, and their ability to self-navigate.
13. Access to the online intake tool is an issue for some in vulnerable cohorts (e.g. experiencing homelessness, experiencing mental health problem) who do not have access to a device or the internet. However, it is important not to generalise as some people within vulnerable cohorts were highly connected and digitally savvy, and expressed a preference for online interaction over phone-based interactions. These preferences did not have a strong correlation with age.



When optimised by Programs, online intake is resulting in significant efficiency gains

14. Programs that have invested more in developing online intake flows that represent the entirety of their intake process have improved conversion rates and efficiency gains from the tool.
15. For most Programs, the intake tool is resulting in significantly less time spent on the phone with help-seekers overall, with efficiency gains of between 22 and 44% across most Programs.

Online intake changes and improves the staff experience of intake

16. The intake tool enables higher preparedness and professionalism in calls with help-seekers.
17. The intake tool is a valuable teaching tool and makes the jobs of new starters easier as they are able to review online applications rather than take calls cold, and can be assisted in the review of applications.
18. The intake tool is reducing the emotional burden of frontline interactions and can provide valuable information to prepare for difficult conversations.
19. Staff think that the tool presents Justice Connect to the public in a more professional, consistent and coordinated way.
20. Staff believe the intake tool is creating greater consistency of information provision and consistency of intake and triage outcome.
21. Not all staff are seeing benefits. While processes have improved and time savings are being realised, there remains inconsistency in approaches and some double-handling of information and processes, which can frustrate both staff and help-seekers. Some Programs have not seen efficiency gains.



Summary of recommendations

Marketing and promoting to help-seekers and referrers is key to growing our reach and impact

1. We will start a digital marketing campaign to attract particular help-seekers to the tool who have a high likelihood of service eligibility, which will hopefully increase yield ratios.
2. We will also start to work with peer organisations in the legal assistance sector to help build digital referral pathways for particular help-seeker cohorts, including people experiencing homelessness and people experiencing elder abuse (where appropriate).
3. Continuing to build Justice Connect's brand and service recognition will assist in increasing the ratio of eligible help-seekers being directed (digitally or otherwise) to our service.

Improvements can be made to service processes and staff training

4. In future iterations, we will ensure that all Programs have reviewed their intake questions and processes, and have made appropriate adaptations so that the online intake tool is seamlessly integrated into the intake process and provides the best user experience possible.
5. Increase number of self-help resources and create topic 'hubs' that help-seekers can be directed to via the online tools, and create more pathways from intake tool to self-help resources for both eligible and ineligible help-seekers.
6. Ensure that we have multiple access points across multiple modalities to ensure that all potential help-seekers can access our services.

Integrating the intake tool into the justice ecosystem will improve the user experience of the justice ecosystem

7. Add further links and referral pathways to other directories and sources of free legal assistance for those who are not eligible for assistance.
8. Create and link to pages explaining Justice Connect's services and how the organisation fits into the broader justice ecosystem.
9. Encourage overall sector-wide commitment to education around legal problems and use of easy to understand terminology.
10. Improve linking out to other services by integrating info exchanges with other service directories as they become available, for example the Victoria Legal Aid ORBIT project and the Ask Izzy project. To our knowledge, there is no national plan to create consumer-facing service directories for legal services which limits the success of this recommendation.

Modifications will enhance the user experience of the tool

11. Retain focus on visual appeal as this is viewed as important by users.
12. Conduct further research and prototyping to address issue of how help-seekers can self-identify the category/ies applicable to their legal problem. Consider the potential of natural language processing.



13. Add a few extra legal categories that describe some recurring issues that Justice Connect cannot assist with (e.g. providing representation to oppose an apprehended violence order, or providing advice on family law property settlements) to improve category selection for these users and more quickly identify that they are ineligible.
14. Simplify means testing. Add flexibility into income assessment screen including ability to enter average, or a range of income to accommodate for casual workers.
15. Adding a progress bar is not easily achievable as each journey through the tool is different. Consider options for indicating progress through the tool.
16. Increase information provided on why a help-seeker is ineligible and provide better connection to services where assistance can be provided or be clear that there is not assistance in the sector that can be provided. Consider use of empathetic language.
17. Reduce clicks to reach substantive start of form from home page and increase the use of tooltips to explanation terms.
18. Remove auto next button functionality.
19. Add prompts to free text fields to explain that they can be written in.



1. Introduction

1. The Gateway Project

Each year, 8.5 million Australians will have a legal problem, and half of these people never access legal assistance. For vulnerable Australians, legal problems compound disadvantage and often lead to other problems including financial hardship, health problems, homelessness and family breakdown.

Justice Connect works to improve access to justice through our specialist legal services and pro bono referral network of over 10,000 lawyers. We help vulnerable people with unmet legal needs to access free legal assistance and we provide legal support to community organisations to strengthen communities. We enable participation in legal systems, and improve legal and life outcomes.

For the last 25 years, Justice Connect has been a key connector between people and organisations who need help and lawyers who want to help. However, our ability to scale has been constrained by burdensome processes across multiple systems, platforms and spreadsheets. It was clear that our impact and reach could be improved through innovative technological solutions.

After 3 months of preliminary research, we pitched the Gateway Project as part of the Google Impact Challenge. We were seeking support to formally investigate better ways of working across some key areas of perceived opportunity:

- the way help-seekers find, connect with and enter Justice Connect and our services
- the way our sector colleagues find and interact with us
- the way we interact with our network of pro bono lawyers
- the way we pull together insights regarding supply and demand to create a more efficient pro bono marketplace.

Justice Connect was a finalist in the 2016 Google Impact Challenge and we were awarded \$250,000 towards the Gateway Project with Google recognising the transformative potential of our plans. As a Google Impact Challenge grant recipient, we were provided with access to a network of Google's staff as well as pro bono support from Social Ventures Australia to assist us to develop our Gateway Project plan.

In 2017, we undertook 12 months of design research, prototyping and testing, and worked closely with end users of our services to understand their experiences and needs. Most of our initial hypotheses were validated, and we identified further opportunities to improve the way we work to increase our reach, scale and impact.

We determined that our Gateway Project would involve the development of a number of different products, each aimed at improving a cluster of identified issues. We would place these products into an ecosystem where they worked together, and could also work harmoniously alongside other organisations' systems in the future. We set out to build adaptable, scalable and portable products.

The Gateway Project's key products are:

1. **Help-Seeker Intake Tool:** A tool to conduct online intake and eligibility assessments to overcome pain points experienced by both help-seekers and staff. Help-seekers can find out if we provide a suitable legal service for them, and if there is not one, they are directed elsewhere. Where a suitable services exists, help-seekers can apply online. This saves time for both Justice Connect staff and the help-seeker. We have released our intake minimum viable product (**MVP**) at help.justiceconnect.org.au
2. **Referrer Intake Tool:** A tool to help sector peers check the eligibility of people they are assisting for our services and make a warm referral into our services and systems. Our referrer tool is currently in testing ahead of a broader roll-out.
3. **Pro-Bono Portal:** A platform to be used by pro bono lawyers to proactively seek out available pro bono work generated from intake and assessments, enabling staff to algorithmically match unplaced matters



with firms. Our portal has been piloted with 14 law firms and will be shortly rolled out to another 30 law firms.

4. Self-Help Resources Hub: a new self-help hub with tools and referral pathways for those not eligible for one-to-one assistance from a lawyer, which will be integrated with our online intake system (we already have 300+ tools for community organisations and we are building tools for individuals on common legal issues).

These products will be linked by a sophisticated CRM with data management and reporting capabilities to identify trends in legal needs, pro bono capacity, and to assist lawyers to track their pro bono contributions. Our development roadmap originally was as follows:

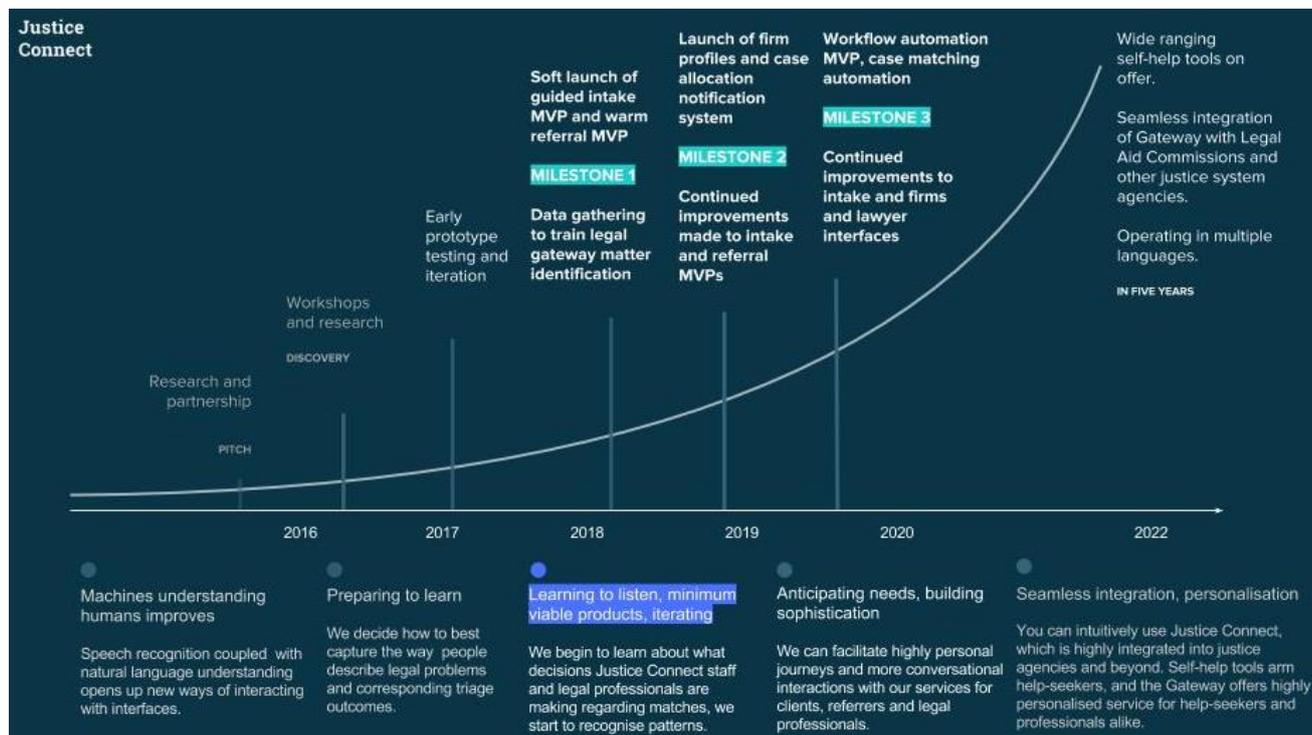


Figure 1: Legal Help Gateway Product Roadmap 2017.

We have so far delivered on time and on budget against our development roadmap. This Report relates to the work that we have undertaken to develop our Help-Seeker Intake Tool.

2. The Help-Seeker Intake Tool

2.1 The Issues

In 2016 we undertook research with each Justice Connect Program about issues they were encountering with their intake models. These included:

- high volumes of ineligible callers taking up significant time and resources, and distracting from outreach
- high numbers of low relevance referrals from sector peers (where a help-seeker is sent to Justice Connect for assistance but is clearly ineligible for a service, or there is no relevant service available)
- difficulty in training staff and volunteers to run our complete intake processes
- discrepancies in intake processes across the organisation
- difficulty scaling services, as reliance on phone-based intake requires ever-increasing staffing to support increasing enquiries and intake.



We heard very early in our research from help-seekers and sector peers that it was difficult to find information about eligibility for Justice Connect’s services, so in 2017 we added a “Get Help” button which led to a summary of each service page as an interim improvement step.



Figure 2: Justice Connect website landing page with added ‘Get help’ button and summary of each service.

These small changes did not make a significant difference, and it was clear that we needed to substantively address the way Justice Connect runs intake and triage. We also identified the need to better understand the experience of our intake and triage from the perspective of help-seekers and our sector. We needed to design products to assist intake and triage with the needs of our users front and centre.

We had also been closely following online intake initiatives and developments in the USA that were aiming to address similar issues and concerns to those that we identified. Our Head of Innovation and Engagement attended the [LSC Technology Initiatives Grants Conference](#) in 2016 and learned about different models and approaches. Justice Connect has benefited significantly from the openness and collaborative spirit of the organisations already working on intake projects when we commenced our work in 2017. This spirit has inspired the publication of this Report.

2.2 Hypotheses on potential benefits of online intake

At the start of our detailed research phase in 2017, we articulated some hypotheses on the potential benefits on online intake that we sought to test with our research. Our hypotheses were based on our early research, findings of groups working on similar initiatives in the USA and the impact of similar initiatives in other sectors, such as healthcare.

Hypotheses on the potential impact of online intake:

- Can provide more efficient processes for both staff and help-seekers.
- Can enable help-seekers to self-enter data into our data standard, ensuring better data consistency at enquiry and intake stages, and less work for staff in cleaning up records.



- Can provide early feedback on eligibility, more promptly informing help-seekers that are clearly ineligible, and reducing the number of clearly ineligible help-seekers spending time on the phone with Justice Connect staff.
- Can provide greater transparency around Justice Connect’s services and eligibility criteria, improving understanding about our Programs and services for both help-seekers and for sector peers.
- Can provide more consistent enquiry outcomes by clarifying eligibility criteria and reducing subjective assessments.
- Can provide easier/alternative access to our services for help-seekers, in particular ensuring that enquiries can be made online at any time of day and on weekends and public holidays.
- Will meet some, but not all potential help-seekers’ needs (and therefore should be offered as one of a collection of channels through which Justice Connect can be reached).
- Can collect data to build a better understanding of patterns of legal issues and usage of our services at an enquiry and intake stage.

3. Project stages

1. Research, in particular including end-users and co-design methodologies
2. Design
3. Prototyping and testing including testing with end-users
4. Build
5. Release v1
6. Evaluate v1, including testing with end-users and data analysis
7. Iterate v1 and release v2
8. Evaluate v2, including testing with end-users and data analysis
9. Iterate v2 and release v3

This report marks the conclusion of the first evaluation stage and informs the first iteration stage.

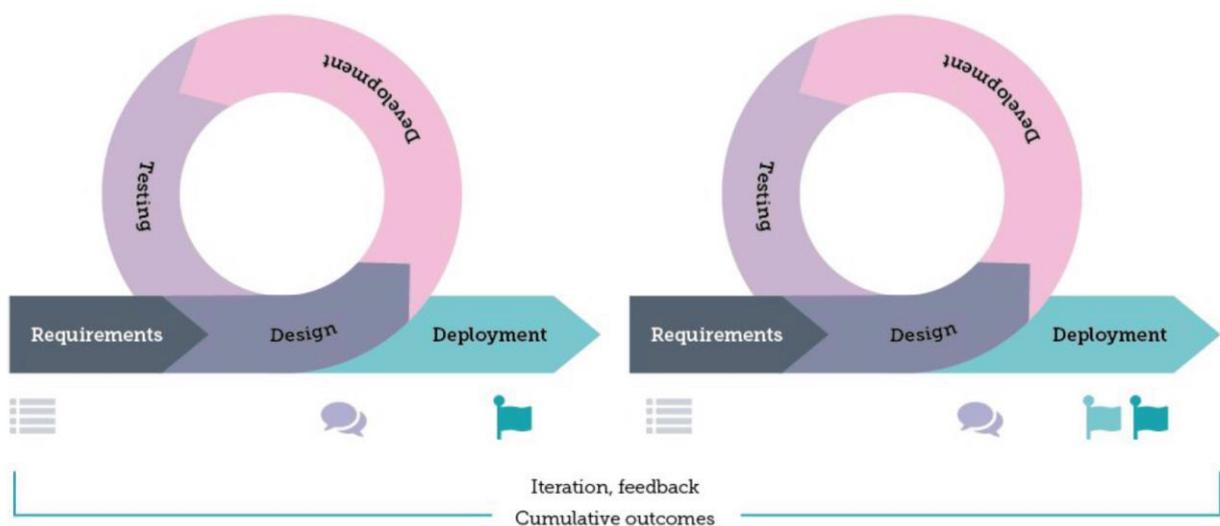


Figure 3: Project stages © Jo Szczpanska.



2. Design and development process

This section of the Report outlines the key design and development processes we used to reach the first release of the Help-Seeker Intake tool. It sets out our design and development processes such as mapping, running workshops, prototyping and refining. It will also provide an overview of the tool in the form in which it was released.

1. Design stages for intake tool v1

In applying our project stage structure, we designed particular activities to run in the following phases:

1. Baseline data summarisation
2. Ethical research planning
3. Staff workshops – initial process mapping
4. Help-seeker research workshops
5. Initial design of product
6. Staff workshops – design critiques and refinements
7. Finalising design and content
8. Build and release of v1

2. Baseline data

In order to ensure that we could measure the project's success, we collected extensive baseline data against which we could make comparisons. This included data on:

- Time taken by staff per intake and triage (quantitative)
- Number of staff and volunteers involved in intake and triage (quantitative)
- Intake yield (number of eligible vs ineligible help-seekers) (quantitative)
- Help-seeker experience of intake (qualitative)
- Staff experience of intake (qualitative)
- Process map of intake and triage

3. Ethical research planning

Justice Connect is committed to treating people engaging in our research with respect, dignity and fairness.

We sought the guidance of experts in co-design from consultancy [Today Design](#) in the creation of our user testing approach. We also sought guidance from our in-house social workers on the most appropriate forums and approaches for our research.

We created a set of customisable information and consent forms, a framework around confidentiality, honorariums and treatment of vulnerable service users or potential service users in our research.

In all of our research we took time to explain the purpose of our research and the data that we would be collecting. Participants were able to remain anonymous, could choose whether or not to have their photo taken or audio recordings made, and could withdraw from the research at any point.



We provided participants with an honorarium recognising the time and effort taken to participate in the research, and we provided participants with a range of food, drink and snacks at sessions (both healthy and fun options). Heart-warmingly, many vulnerable participants donated their honorarium towards our work.

As one example, we attended an outreach clinic for people experiencing homelessness to seek participants to engage in simple 5 minute tests of our intake tool. We offered a keep-cup or range of treats, and an orderly queue formed at the centre. We successfully engaged with 12 participants in 1.5 hours.

Investing in ethical and respectful research practices has built trust internally. Our lawyers are happy to suggest to their clients that they might consider participating in our research because they trust it will be carried out professionally and respectfully.

No participant across our whole 3-year project has expressed any concern about our approach or methods. We regard this to be a significant success.



Figure 4: Staff attending training on human centred design research at Today Design with Jo Szczepanska.

4. Research workshops

4.1 Staff workshops – initial process mapping

We ran a range of workshops with staff. Initially we asked them to create a process map of the enquiry, intake, triage, service delivery and closure processes at Justice Connect. This was the first time this exercise had been undertaken at Justice Connect. We also sought feedback on some early ideas for online intake and some products in the market in other industries.

Our mapping exercise surfaced interesting overlaps and potential necessary differences in approach between Programs. It also highlighted that once a help-seeker is in a certain Program stream of intake, it is very difficult to move them into another Program, or to service them in two Programs at once.



Figure 5: Process mapping with Justice Connect staff in our Melbourne office.

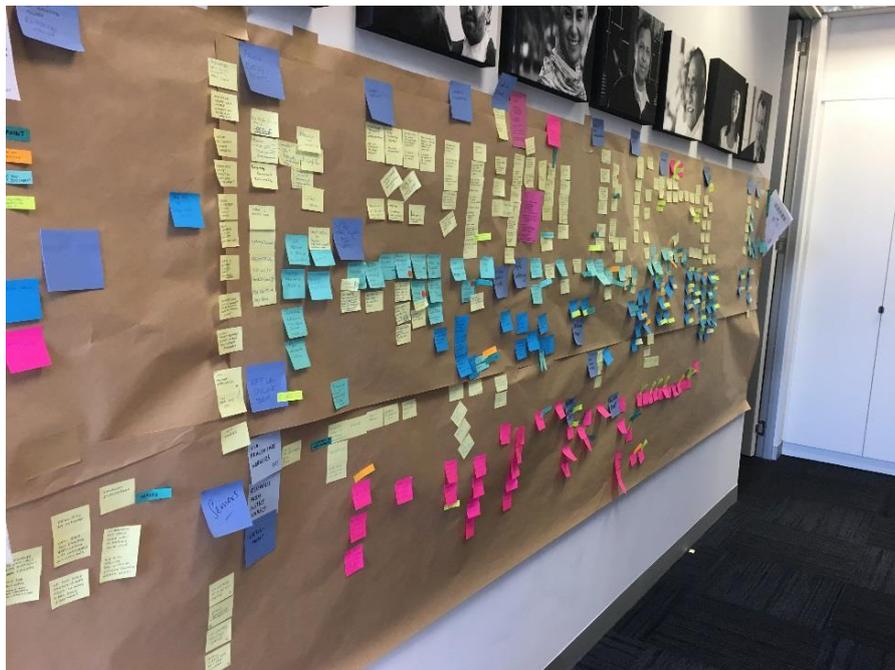


Figure 6: A process map created by our staff.

Our workshops and mapping with staff identified many inefficiencies and pain points in the intake process that affect both staff and help-seekers.

4.2 Research workshops with help-seekers

We undertook a series of workshops with people from different demographic groups who had recently sought assistance from Justice Connect with a legal issue. A number of our participants experienced intersectional disadvantage, which was also important for our research. For example, speaking English as a second language and also experiencing homelessness, or experiencing mental health issues, housing instability and low income, or being homeless and identifying as Aboriginal.

In our workshops, we undertook a range of exercises aimed at understanding the help-seeker experience of identifying a problem, looking for help, and connecting with Justice Connect and/or other services. This included:

- journey mapping
- story-telling
- reflecting on experiences with other services
- providing feedback and critiques of online intake systems used by other organisations (both legal and non-legal), and
- concept critiquing of new approaches that we hypothesised might be improvements on existing models.



Figure 7: Concepts with participant feedback.



Figure 8: Illustrations of research participants.

4.3 Help-seeker workshop findings

Key problems and pain points expressed by help-seekers included:

- the process for applying for help is unclear
- Justice Connect's service areas aren't clearly summarised or differentiated for help-seekers
- eligibility criteria of service areas are unclear or unstated
- help-seekers get inconsistent responses in regards to eligibility because they are interacting with different parts of Justice Connect that have different criteria
- many participants did not have a strong understanding of Justice Connect's brand or point of difference before using the service (e.g. wondering if it is part of the Government)
- services that offer only phone-based intake can be hard to connect with. Access to phones can be difficult.
- can be long waits in some services to find out whether the service is able to find an available lawyer, and
- sometimes help-seekers just want to be pointed in the right direction – to go through a full intake process for this seems unnecessary as it can take up to 45 minutes.

Key positive reflections on Justice Connect from workshop participants were:

- help-seekers who received legal assistance felt the quality of service was very high
- help-seekers who have interacted with other services felt that the quality of assistance and advice received from Justice Connect was significantly higher than other services
- in full representation services, clients felt that Justice Connect would not abandon them – they would work with them until the problem was fixed even if this took years
- you don't feel like a number at Justice Connect, you are treated professionally and are properly listened to, and
- staff explain the law and options available well.

5. Initial designs and prototypes

Following staff and help-seeker research, workshops and concept critiquing, we created a list of key criteria for online intake based on the insights gathered from our research. We also mapped a new approach to intake that would increase consistency and commonality in approach across Programs.

To test whether we were heading in the right direction we used a range of strategies from showing various help-seekers and stakeholders high-fidelity designs, through to creating basic and then more sophisticated interactive prototypes for testing.



Examples of prototypes

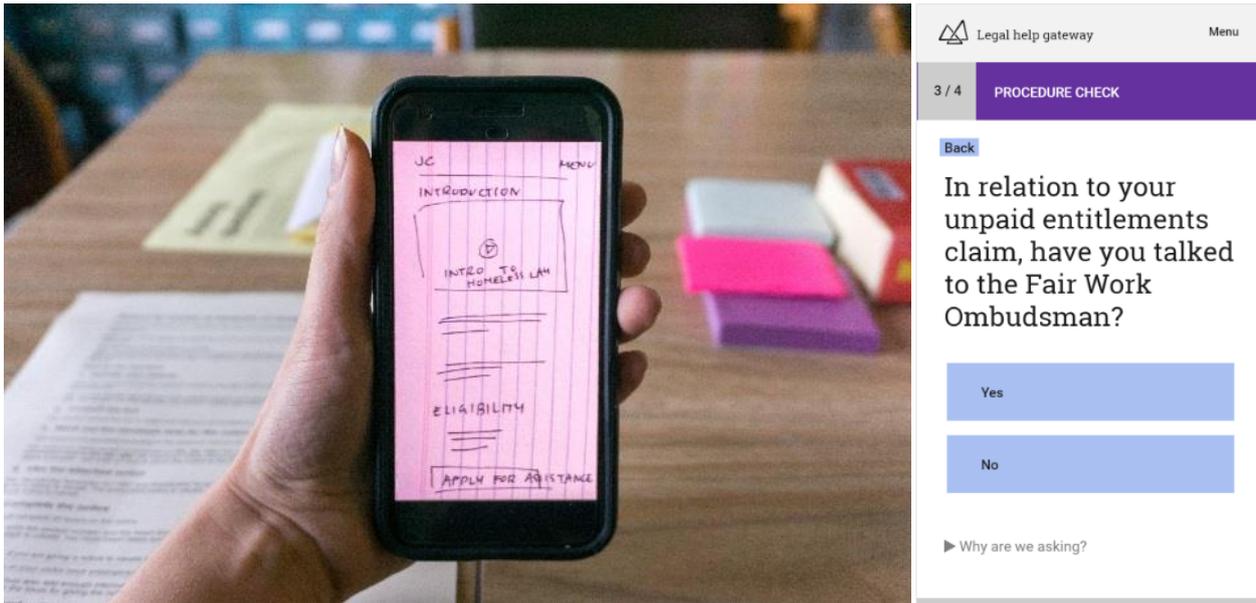


Figure 11: Our initial prototypes started with the basics.

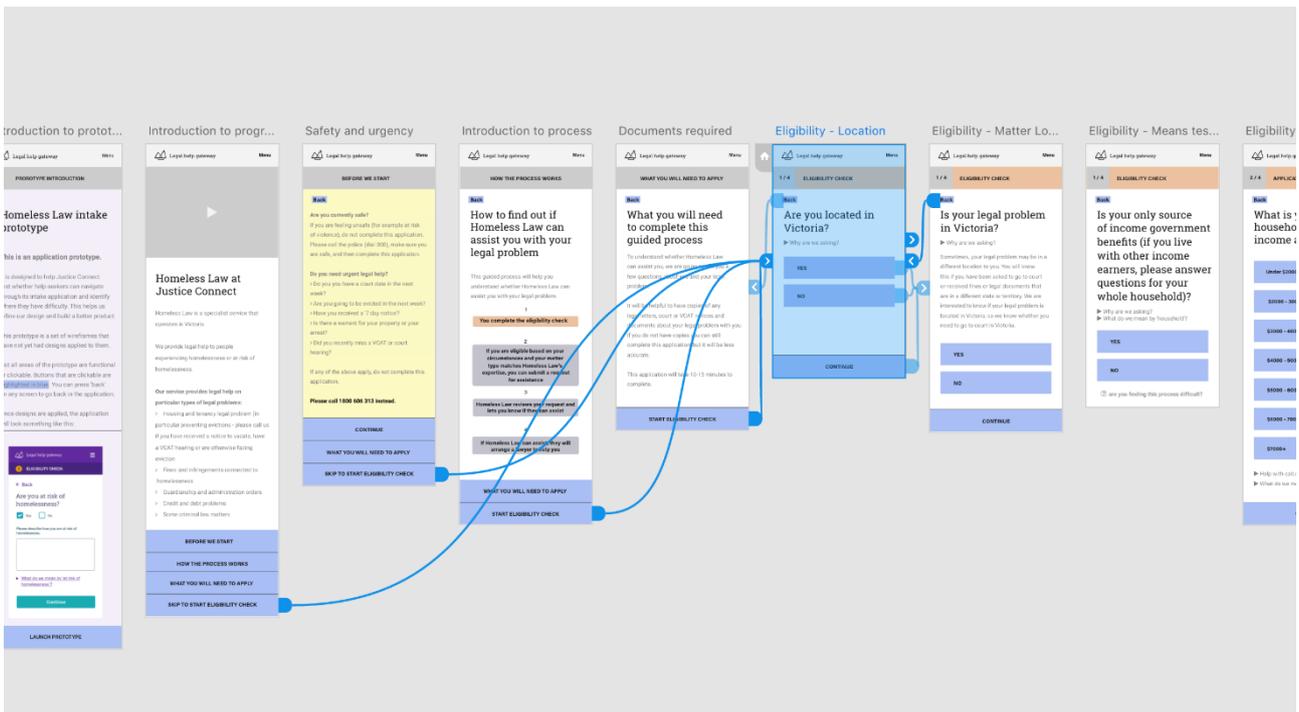


Figure 12: Interactive, clickable prototypes for final user testing.



Examples of high fidelity designs

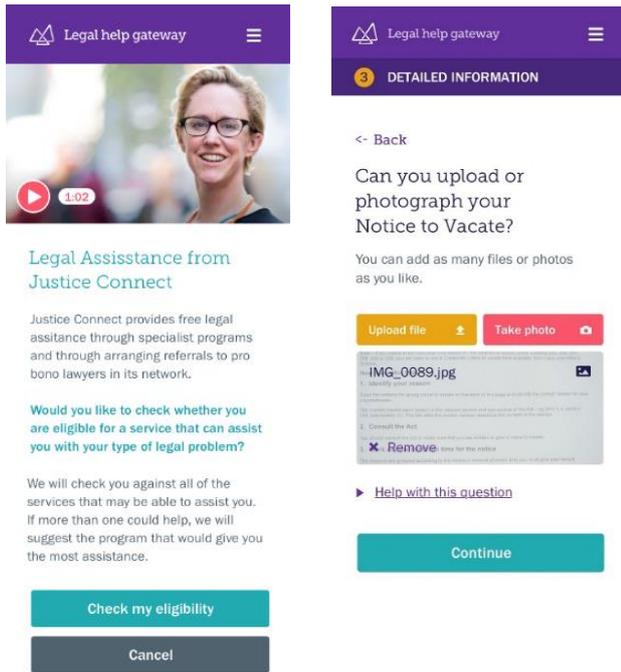


Figure 13: High fidelity designs created after further testing.

6. Staff workshops – design critiques and refinements

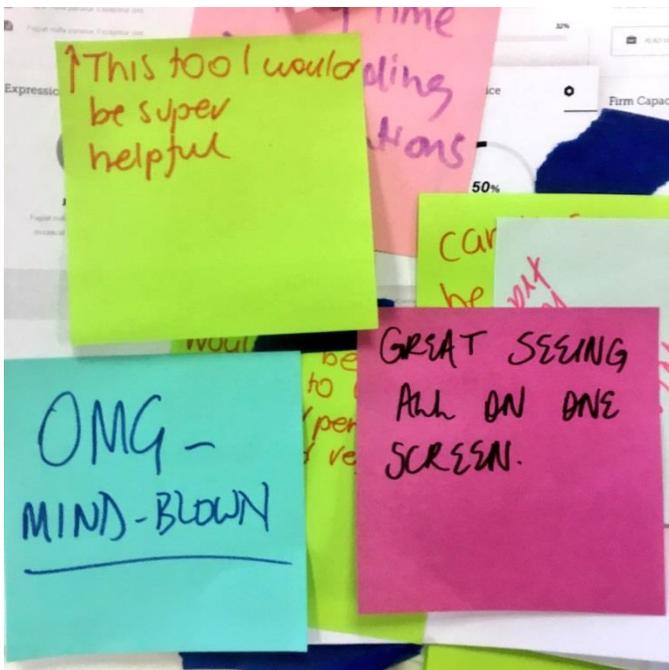


Figure 15: Initial design concept critiquing by staff.

After completing our workshops and design sessions with external stakeholders and help-seekers, we presented our design concepts to staff for critiquing.

From the information gained in these workshops, we undertook some further design work.

We then ran report-back sessions with staff to explain all of our research findings and our proposed next steps.

We undertook these workshops on multiple occasions in both Melbourne and Sydney.

Overall, most staff feedback was highly positive, validating the suggestions of help-seekers and the design team, and staff input on the workability and feasibility of certain suggestions was highly valuable.





Figure 16: Justice Connect's Sydney team provide feedback on design concepts.

Staff provided final input to the design of the intake tool prior to the team commencing the build phase. This step helped to identify what features were essential for a minimum viable product.

7. Finalising design and content

After our user testing with designs and prototypes and staff workshops was synthesised, we finalised the requirements for an intake tool that would satisfy our definition of minimum viable product, and worked on a visual design for the first release.

Our key criteria for our minimum viable product were:

- help-seekers can both apply directly to particular Justice Connect Programs or get automated guidance to match them with the Justice Connect service that they are eligible for
- the tool facilitates applying to multiple services at once (rather than only allowing a help-seeker to proceed to apply with one Justice Connect Program)
- help-seekers should not have to provide identifying information until the services they are applying for could be made clear to them
- high security platform and database
- visual appeal and user friendliness exceeds products tested by users in our research that were considered “ugly,” or not user friendly
- greater consistency of outcome
- simplification of question language and presentation compared to current intake approaches by services
- facilitates document upload by help-seekers at appropriate points in the process
- easy for staff to access entries and review, with email notification of entries to relevant staff, and
- editable and adaptable in-house.

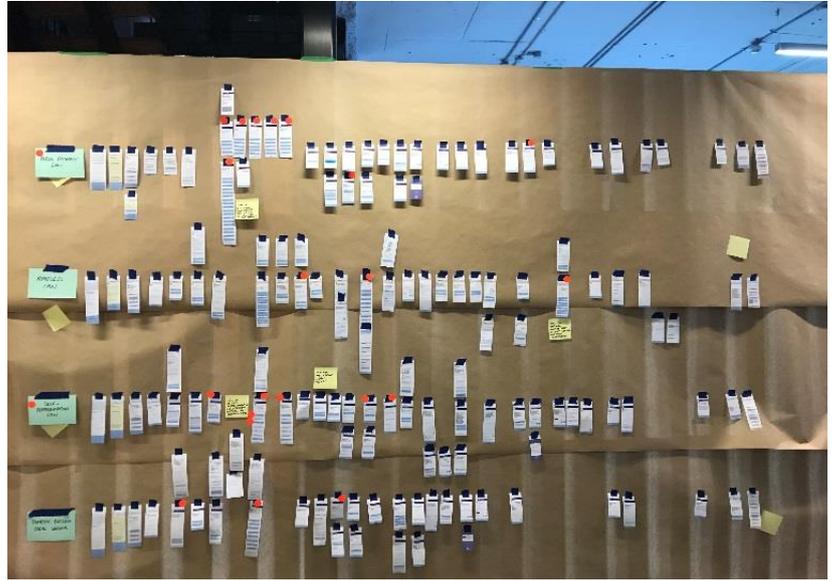


Figure 17: Process mapping created by Justice Connect staff.



Figure 18: Design concepts.



8. The Help Seeker Intake Tool

8.1 Components

The Help-Seeker Intake Tool was finalised as a series of user journeys designed to flow seamlessly and adapt for each user, enabling them to find out if they are eligible for a Justice Connect service and make an online application.

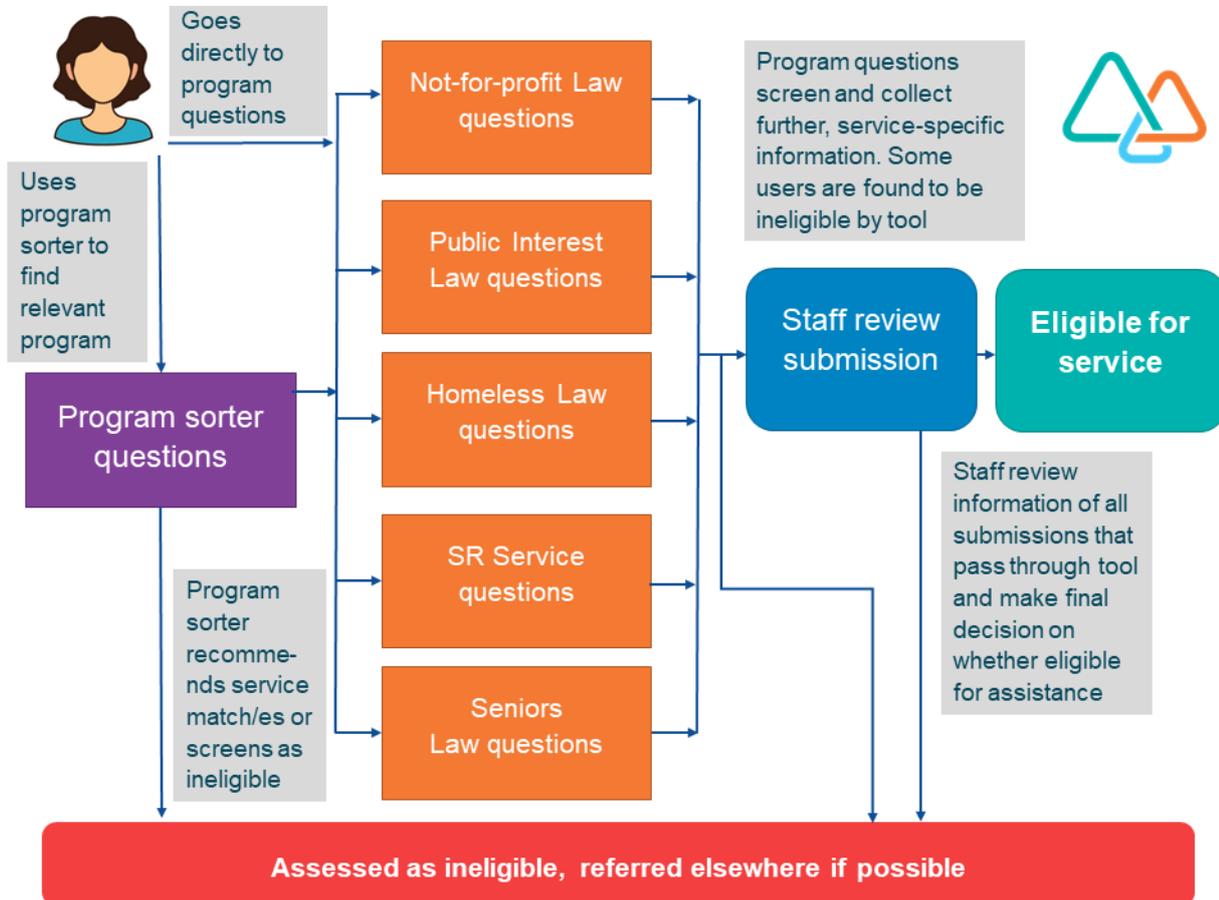


Figure 19: User Journeys of the Help-Seekers using the Intake Tool.

8.1.1 Program sorter

The Program Sorter was designed in response to feedback that it was difficult for help-seekers to understand which of Justice Connect's Programs is most appropriate (if any) for them.

The Program Sorter asks up to 7 questions of any help-seeker to determine if a Justice Connect Program may be appropriate for them. The key aim of our Program Sorter is to connect eligible help-seekers with the right Justice Connect Program as quickly as possible, and to inform help-seekers if they are clearly ineligible as early as possible. The Program Sorter screens out approximately 65% of users who are clearly ineligible for any service. This means that 35% of program sorter users proceed to further questions relating to a particular program. When a help-seeker is connected with a Program, they are asked a further set of questions (see 8.1.2), and further users may be screened as ineligible for lodging an application for assistance.

8.1.2 Program intake questions

Each Justice Connect Program has a full set of questions that provide eligibility screening and collect all the information needed for triage and service provision for that Program. The direct pathways enable our staff and referrers to send help-seekers to a Program-specific question flow without going through the Program Sorter. The Program applications can be found on each Program's webpage and are included on marketing collateral.



If an eligible help-seeker decides to apply to one or more Justice Connect Program via the Program Sorter, their relevant answers are pulled through from the Program Sorter to their Program application so that they do not have to re-enter information.

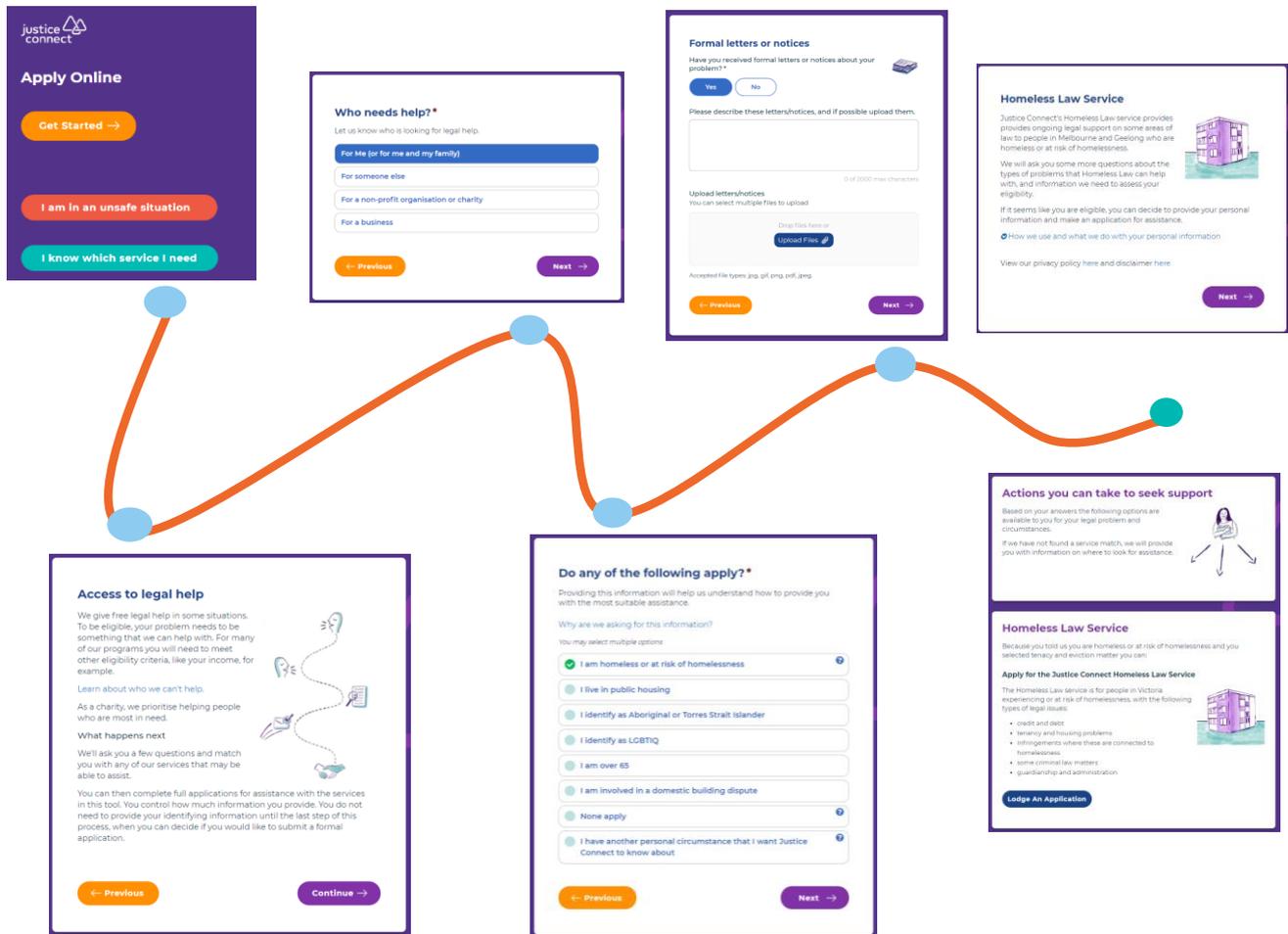


Figure 200: Flow from the Program Sorter to the commencement of Homeless Law’s Program questions.



9. Release of Help-Seeker Intake Tool and new website

We released the Help-Seeker Intake Tool in two stages. We first released the Program Sorter component on our original website in June 2018. At the same time we commenced work on building a new website that would prioritise help-seeker needs over other website user needs (e.g. our corporate stakeholders or funders). We released our new website on 21 August 2018, along with our completed Help-Seeker Intake Tool, including full online intake journeys for each Program – a product we considered met our minimum viable product criteria.

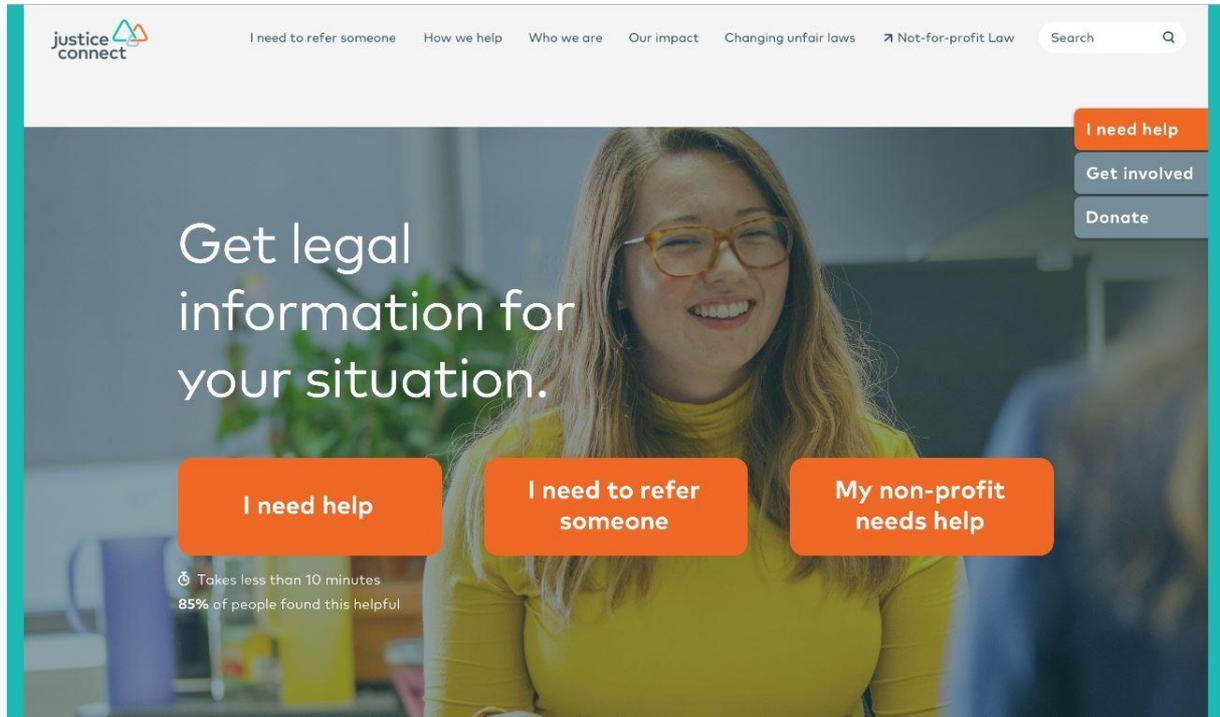


Figure 211: The new website <https://justiceconnect.org.au/>.

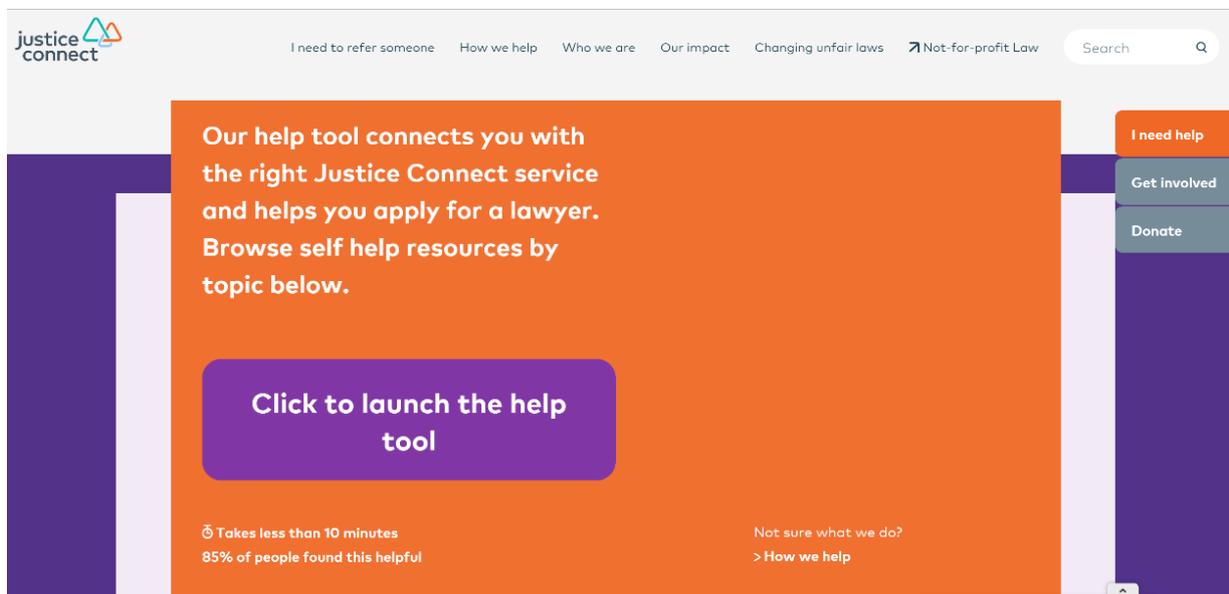


Figure 22: Help page on the new website.

3. Post-release evaluation methodology

This section of the Report provides a summary of the methodologies and evaluation processes used to assess the performance of our first Help-seeker Online Intake Tool release.

1. Evaluation approaches

We have undertaken the following data collection and evaluation activities:

1. Data collection and analysis
2. User testing and user survey data and analysis
3. Staff feedback and analysis

2. Data collection and analysis

Since its launch, we have been tracking usage data and analysing information on how users have been interacting with our online intake tool. We have undertaken significant data collection, collation and analysis.

Our key data sources are:

- Google analytics
- Hotjar
- Form data (analysis of information in the fields in the applications we have received and data and analytics from our form platform)

Our approach aims to use data to draw insights and conclusions on:

- The reach of the intake tool
- The user journey and experience of finding the tool in an online setting and navigating the tool (including key drop out points etc.)
- Usage trends (e.g. time of day, area of legal concern etc, time spent in tool.)

3. Help-seeker analysis and feedback

Help-seeker and potential help-seeker insights were gained through in-person testing, on-page feedback mechanisms through Hotjar, and through directly surveying our intake tool users.

3.1 In-person testing

Intercept user testing was conducted in October 2018 at Launch Housing St Kilda, cohealth Central City and Fitzroy Legal Centre in Melbourne, Australia. Participants were clients of each organisation. We approached individuals in the waiting room at each organisation and asked if they would like to test our online intake tool.

We conducted testing with 15 individuals, in addition to the 38 individuals that we included in our design and prototyping research.

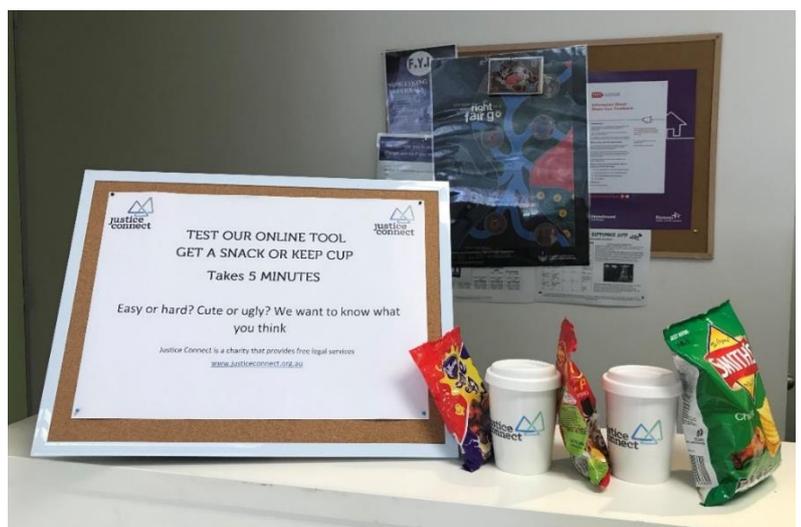


Figure 23 In-person testers were offered keep-cups or a range of snacks for their participation.

When approached, we informed potential testers that participation was voluntary and independent from the service they were receiving at Launch Housing, cohealth Central City or Fitzroy Legal Centre. All participants were given and asked to accept an Information Sheet which included consent to participation. Participants were given food and keep-cups for their participation.

We used a semi-structured interview script but allowed for conversation to flow. Written notes were taken of the sessions. The sessions varied in duration lasting from 15 minutes to 1 hour.

The sessions consisted of the tester “clicking through” the online tool on either a MacBook Pro or iPhone 5, with interviewers answering questions and noting concerns throughout. This process lasted roughly 15-45 minutes depending on the time a participant took to complete the task and the number of legal scenarios tested.

Some clients were also asked about their own internet and device use, the tool's design elements and to give some general feedback.

3.2 Survey of real-world users

Since implementation of our online intake tool, over 3000 users have completed our online intake process in real circumstances of seeking legal assistance. We asked each of these users to opt-in to a follow-up survey, and 256 did so.

We created a survey using SurveyMonkey, an online tool that allows users to conduct surveys in a simple and easy-to-use format, and sent the survey to 256 consenting users by email. Participants were invited to respond to the survey anonymously and encouraged to give honest and reflective feedback.

Of the 256 who were sent the survey, we received 78 completed surveys, which equates to a 30% response rate. We regard this as a very high and successful response rate, with average external surveys generating 10-15% response rates according to SurveyGizmo.

We also used our Hotjar tracking software to offer polling on the help page of our website. Help-seekers who engaged with the poll gave us valuable feedback.

4. Staff feedback

Staff feedback has been collected both qualitatively and quantitatively. To collect qualitative feedback and recommendations for improvements to the intake tools, we ran in-person workshops in both our Sydney and Melbourne offices with staff that work in our intake processes.

We have also collected quantitative data on the time staff are spending on intake include comparative measures between phone-based intake and online intake.

The questions and staff responses were then displayed in our offices for all staff to review and add to. We synthesised the workshop findings and sent these to staff for further reflection.



4. Tracking and analytics data

Our data analysis is focussed on the period of 1 October to 31 December 2018 (Q2 of our financial year). We collect data, both in raw form and in synthesised form, through a range of tools and platforms that we set out below. We will continue to compare data from this quarter on a year to year basis into the future.

In Q2, 1,835 people landed on the first page of the program sorter. 933 people navigated the Program Sorter through to being recommended a service (i.e. they were not screened as ineligible, or did not drop out). 1,057 people commenced the Not-for-profit Law Program series of questions, and 217 people went on to make a full application for assistance to the Not-for-profit Law Service (i.e. they were not screened as ineligible in the program series of questions, and continued to the final step of the series of questions). 392 people commenced the Public Interest Law question series and 103 made full applications for assistance to the Service. 163 people started the Homeless Law question series and 19 made full applications to Homeless Law. 246 people started the Self-representation Service question series and 47 made applications for the Self-Representation Service. 18 people started the Seniors Law question series and 3 went on to make a full application.

1. Google Analytics

1.1 Usage pattern in Q2 18/19



Figure 224: This diagram illustrates consistent usage of the help tool in Q2.

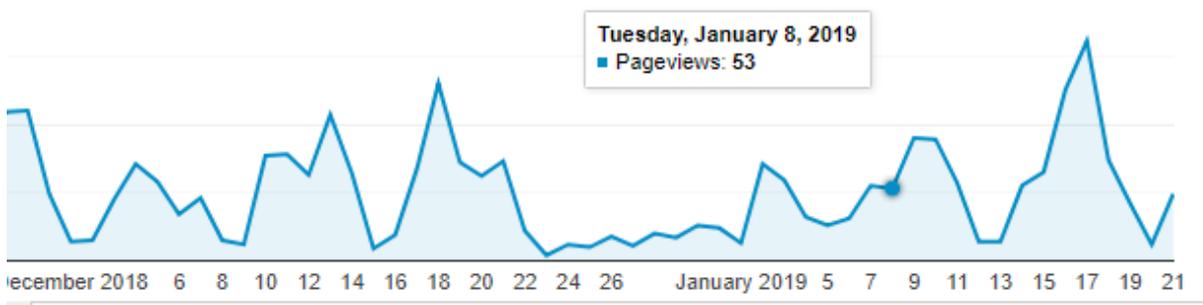


Figure 235: This image is a zoom-in on December and January.
Note: only one week of depressed usage, and the peak on Thursday Jan 17.

1.2 Q2 usage of help tool and conversion to ‘submitted’* entries (data from Google Analytics and form entry data)

| Intake Tool Page | Page views | Unique Page views | Average time on page | Actual completed subm’ns in quarter* | Conversion rate from start form to complete | Conversion from complete to client |
|--------------------|----------------|-------------------|----------------------|--------------------------------------|---|------------------------------------|
| / [program sorter] | 2,594 (49.75%) | 1,835 (48.04%) | 00:03:16 | 933 | 35.9% | NA |



| | | | | | | |
|---------------|-------------------|-------------------|----------|-----|-------|------|
| /nfplaw/ | 1,223 (23.46%) | 1,057 (27.67%) | 00:05:14 | 217 | 17.7% | 44% |
| /pil/ | 505 (9.69%) | 392 (10.26%) | 00:03:06 | 103 | 20.4% | 5.4% |
| /homelesslaw/ | 207 (3.97%) | 163 (4.27%) | 00:03:38 | 19 | 9.5% | 17% |
| /srs/ | 322 (3.62%) | 246 (3.40%) | 00:03:15 | 47 | 14.6% | 12% |
| /seniorslaw/ | 20 (0.38%) | 18 (0.47%) | 00:03:32 | 3 | 15% | NA** |

*Getting to a 'submission' point in a form, means that the user reached a point where their data was recorded and submitted. Where a user has been off-ramped, including with a referral to another organisation, this is often not counted as a submission.
 ** Data not available in segmented form

1.3 Demographic data from Google Analytics



New service DBLS introduced in Q3

Our Domestic Building Legal Service online intake pathways were launched at the start of Q3. Therefore, the service's data has not been included in this evaluation. However, early signs are showing significant success for their online intake pathway.

Conversion rates are high – at 40%, from submitted applications to progression to client. The service has experienced a reduced burden on phone staff, and has also experienced a reduced average processing time for intake and triage where the online entry point is used.

2. Hotjar data

Hotjar is an online tool that tracks data and sources feedback to monitor and improve the performance of websites and user experiences. Hotjar does this in two different ways: providing analysis of data and actively sourcing feedback from users through polls, surveys, and unprompted feedback functions.

2.1 Hotjar funnel data

Funnel data from quarter – analysing behaviour moving from front page, to help page, to intake tool.

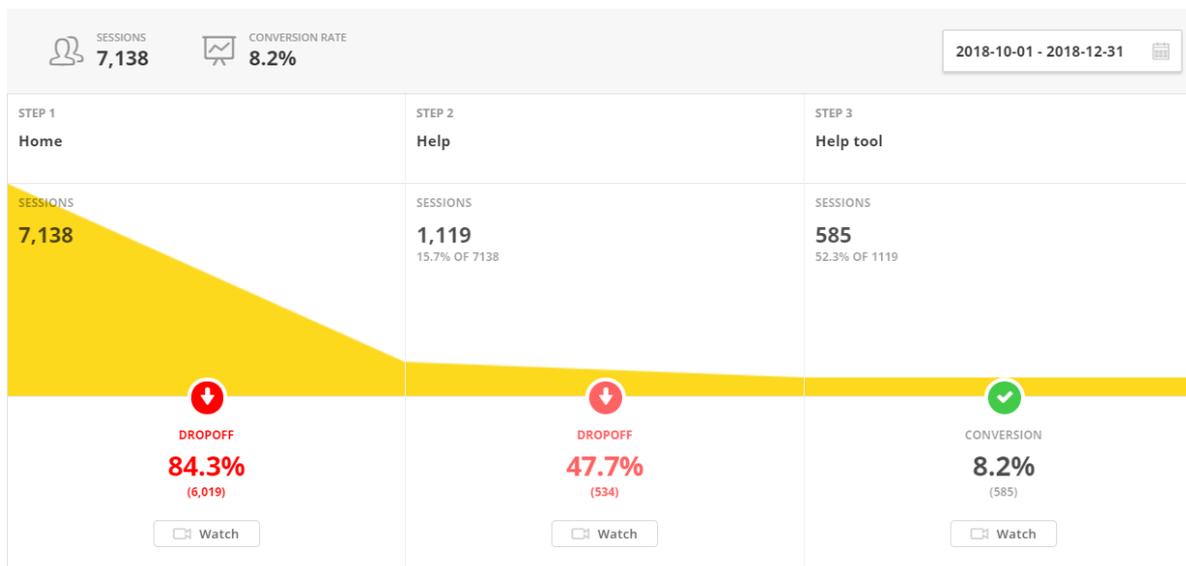


Figure 246: Our Hotjar data shows that we have a solid conversion rate from our front page to our intake tool.

The progression from Home to Help to the intake tool means that 15.9% of all people landing on our homepage (including people who do not need help) navigate to our help page, and then 52% of those who have navigated to our help page take action by launching the help tool.

2.2 Hotjar heatmapping

The heat map gives an aggregate of engagement on the Justice Connect home page. It is aggregated into clicks on the page. The visualised visitor behaviour with heat map tracks and identifies areas of weakness or opportunities in the layout and content hierarchy of the page.



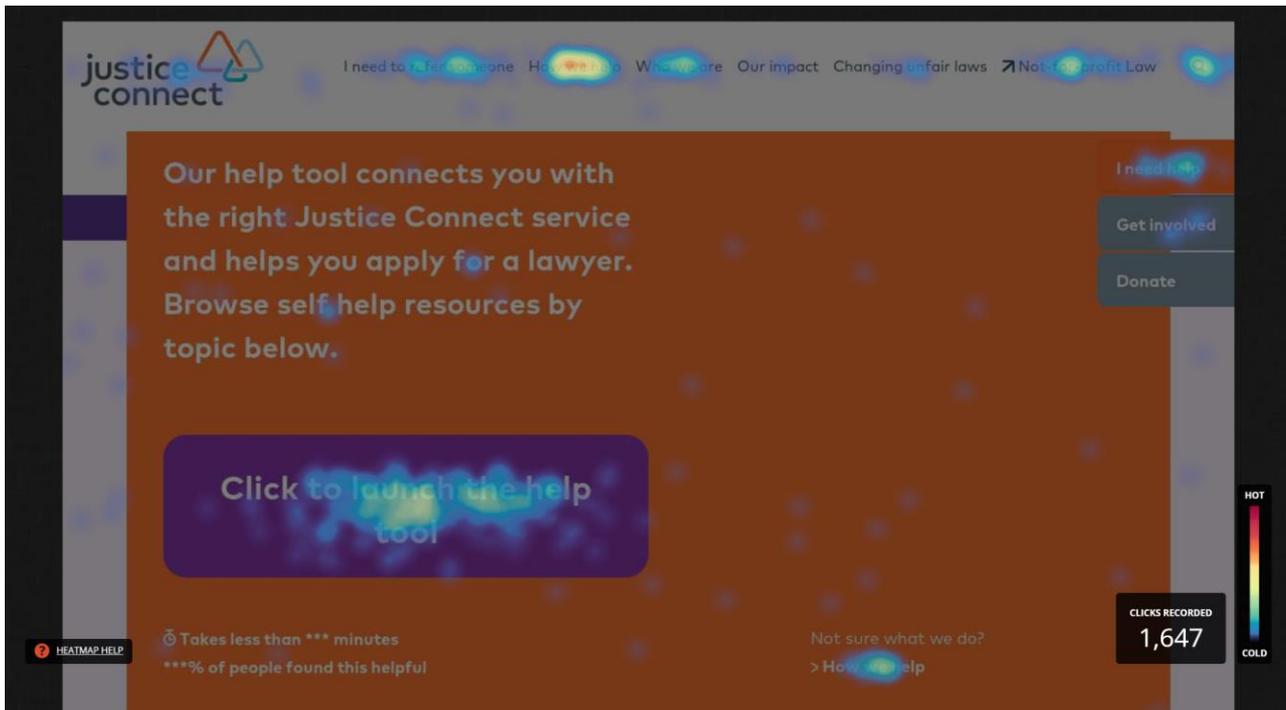


Figure 257: A Hotjar heat map indicating that help-seekers are engaging with 'How we help' strongly, indicating a desire for more information on Justice Connect's services.

3. Insights from data analysis

3.1 General usage of the online intake tool is trending upwards

Q2 data analysis shows steadily increasing use of the intake tool. Initial data from Q3 sees this trend extending. This is occurring despite no marketing or promotional activity. Certain Justice Connect Programs are not seeing high online engagement, particularly Homeless Law and Seniors Law. These services have traditionally operated using a referral model, where most help-seekers are directed to Programs via another professional service (eg a health professional or social worker), rather than seeking assistance directly with Justice Connect.

Our initial design research indicated that people with legal issues that these Programs could help with are willing to use online self-navigation tools to apply to services online, especially when they were return users. We believe we need to target these users through promotions and marketing to better connect with them directly, and we will measure whether this impacts on application rates.

Our data analytics also show that we are getting many applications out of hours, on weekends and public holidays, validating our hypothesis that people would value a channel to make applications for assistance with Justice Connect outside of business hours.

3.2 Conversion rates are variable across Programs

Conversion rate data is important to assess. Conversion rate is the percentage of users that go through a process and convert into a next stage (eg. conversion from program sorter into program questions, or conversion from submitting application to becoming a client of Justice Connect). A low or high conversion rate does not, of itself, provide much insight, but can be useful when viewed in the context of the aims of the tool, or part of the tool.

Our Program Sorter was designed to quickly screen out ineligible help-seekers so that they do not spend significant time applying for help when they are clearly ineligible. Therefore, a low conversion rate from commencing the Sorter to progressing to commencing program questions reflects the tool working well as a screening tool. Conversely, if we were attracting help-seekers to the Program Sorter through targeted digital marketing we hope to see a higher conversion rate to users that have been specifically targeted to come to the



Early comparison with Q3 data showing growth

Aggregate page views of intake tool: Q2 4871, up to 6,165 in Q3

Aggregate unique page views of intake tool: Q2 3,820 up to 4,641 in Q3

Program Sorter views: 2,594 in Q2 up to 2807 in Q3

program sorter. We will keep tracking the 35.9% conversion rate from commencing the program sorter to entering a Program series of questions.

When Not-for-profit Law first launched their intake tool Program series of questions, its conversion rate from commencing the Program questions to lodging a completed application (i.e. not being screened out by the Not-for-profit Law specific screening questions) was 10.7%. We believed this was low. We removed some screening questions from the Program question series to enable more help-seekers to proceed through to submitting an application for staff review. This increased the conversion rate from starting the form to completing

an application to 17%. Despite the broadening of the questions, 44% of those lodging applications go on to become clients of Justice Connect.

The Public Interest Law program questions have the lowest screening impact, with 20% of those commencing the Program specific question series going on to lodge a full application. Of these full applications, only 5% convert to becoming clients, which means that the Public Interest Law questions need to be refined to screen out more ineligible help-seekers to reduce the frustration for help-seekers of submitted a full application only to be rejected, and the time spent by staff assessing ineligible applications.

3.3 Time on page spent by users is meeting aims

We are pleased with the time-on-page data which indicates that, on average, the Program Sorter takes 3 minutes and 16 seconds to complete, and the further program questions take between 3 and 3.5 minutes. On average, the whole user journey from start to finish is well under ten minutes.

3.4 Our average online intake user is a 35-yr-old female from Melbourne

Our tool is most used by people aged between 25 and 45, and there are significantly more women than men using our online intake tool. Women are also spending 26 more seconds on average in the tool per session. We plan to investigate this data further, in particular the gender split.

Recommendations

Notes on hypotheses

- Hypothesis that many people will be happy to use online channels is validated by high (and growing) usage numbers despite no promotion
- Hypothesis that help-seekers will connect with Justice Connect out-of-hours, on weekends and public holidays is validated

Recommendations

1. Create a digital marketing campaign to attract more eligible help-seekers to the tool and increase conversion rate. Take into account the demographics that have responded well so far (double down) but also target those who we are not yet reaching well online
2. Create a targeted campaign directing Homeless Law and Seniors Law potential clients to online channels at service delivery partners e.g. social workers, housing workers and health workers



Recommendations cont

3. Work with Justice Connect services to refine intake questions in the online intake tool to extend the tool for their service. This applies in particular to the Federal Self Representation Service and the Public Interest Law Service. This will require creating specific question sets relating to particular issue areas
4. Work with services to streamline the processes involved in moving from intake to assessment so that less staff are involved. This is occurring as part of a universal intake and triage project, aiming to create one consistent approach to intake and triage across Justice Connect. The process will be formalised in our CRM.
5. Update the website use of large buttons as these do not appear to be attracting as much interaction as menu items



5. Help-seeker feedback

Help-seeker feedback is vital to understanding how users are engaging with and what they think about our tools. Information gathered from help-seekers allows us to learn how to make our intake tool more efficient, accurate and easy to use. Our help-seekers are in unique personal and legal situations with varying needs, so it is important to gather as much data as possible in order to design a tool that can cater for all users.

We conducted user testing in-person through surveying our users and through watching recordings of user sessions via Hotjar. Our different approaches were designed to capture data on different types of users, with methodologies appropriate to those users. For example, to ensure that we reached users (or potential users) who are more marginalised or vulnerable, we undertook more in person testing, and for those who had successfully navigated the tool through to submission (and therefore demonstrated digital capability), we followed up for feedback with online surveys.

This section will outline the findings of each of these testing processes individually.

1. Online surveys

1.1 Survey Monkey survey

We surveyed 256 people who used the intake tool by sending them an online survey to complete via SurveyMonkey. We had 78 responses, which equates to a 30% response rate (significantly better than average survey response rates).

The questions asked in the survey were designed to generate specific responses on how the user engaged with our intake tool, how they engaged with our services more broadly, online services more generally and also how they were progressing with their legal matter.

1.2 Data captured by the SurveyMonkey survey

Overall, the survey feedback shows a picture of a reasonable experience of using the online intake tool. Most users did not have any technical or design concerns, and were pleased with their experience of the intake tool. The weighted average of rating the online application process out of 5 was 3.43 (based on 67 responses).

Significantly, only 16% of respondents were users of the tool that went on to be eligible to receive legal advice or representation through Justice Connect.

While general feedback on the intake tool was good, there was a reasonable level of negative sentiment expressed overall by respondents, and in particular, a disappointment in the broader experience of looking for legal assistance. Concerns expressed often related to either:

- concerns that the respondent's legal problem or circumstances seemed to fall outside our eligibility requirements as well as other organisations' – i.e. that they were a part of the justice gap in Australia
- a perception that the system or people they ultimately spoke to had not understood their problem, or more specifically had not understood, why their problem *matters*.

Do you prefer to apply for assistance by phone or online?

66% of surveyed users responded that they prefer to make an application for assistance online.

2. Insights from the survey data

2.1.1 Participants responded favourably to availability of online channel for applying for assistance

When asked whether they preferred to make applications for assistance online or over the phone, 66% of respondents said they preferred to do so online. When asked how comfortable they felt making an application online, 67% were either extremely comfortable or comfortable (35% said that they were extremely comfortable and 32% said that they were comfortable), while only 5% said that they felt very uncomfortable and 6% said that they were uncomfortable.

Our insights into comfort with use on of online channels is consistent with the findings of the 2016 Victorian Access to Justice Review, that there is an increasing acceptance and familiarity with flexible mobile and online services.¹

Comments expanding on the question of whether online or phone applications were preferred included:

Those who prefer online do so because:

"I don't like the phone due to social awkwardness."

"No waiting, questions help clarify, dealt with application in one step."

"Time to think, edit, consider phrasing. Your own words and not another parties."

"I am abroad"

"Easier to do at any time of the day/night"

"takes too long to explain on phone and more likely to forget points"

"Sick of repeating myself and not getting help"

"Gives me time to think"

Those who prefer by phone do so because:

"more detail can be provided"

"You are talking to a human being"

"sometimes it is not a one size fits all problem and talking to someone to direct you is better"

"More flexible, more personable, more information, more reassuring"

"I font [don't] understand alot of legal terms"

"Feel like someone is hearing you"

2.1.2 Respondents generally appreciate the tool but have suggestions for improvements

Positive comments included:

"This is a great service as it is not easy to know who trust or where to turn at times particularly in regard to legal matters"

"Big thank you. I received pro bono legal assistance. I would not of been able to afford this and it has made a huge difference thank you"

Survey participants responded constructively to requests for potential improvements to the tool and to the processes surrounding it. Example responses are set out below.

¹ Department of Justice and Regulation, *Access to Justice Review*, Summary Report (2016), 9. Available at https://s3.ap-southeast-2.amazonaws.com/hdp.au.prod.app.vic-engage.files/9814/8601/7130/Access_to_Justice_Review_-_Summary_and_recommendations.PDF



“Description section to enable a more accurate ability to find or determine services available”

“It was a bit convoluted trying to find the area of law I needed assistance with”

“More intelligent?”

“Streamlining request for assistance maybe in chat form?”

“By giving better guidance as to cases you will not support and cases you will.”

“Perhaps one case manager per case not multiple people handling ...Thank you.”

“Show more flexibility and openly outline what your guidelines allow, might save a lot of time”

“Not ask so many questions if you can't help people in the end”

2.1.3 Respondents illustrate high levels of unmet legal need in the Australian community

For those respondents that were ultimately ineligible (, when asked whether they found legal assistance with another organisation, the vast majority of respondents said that they did not. This reflects the known levels of unmet legal need in Australia, and provides a glimpse into the experience of those who look for help, cannot find it, and cannot afford to pay for a lawyer.

When asked to expand on whether or not they had found assistance elsewhere, many respondents portrayed a legal system that is failing meet their needs:

“I needed help didn't get it. There is not many places that people can actually get help with some legal matters”

“It's unfair that in 2019 normal Jane Doe can't get justice as she is unable to afford it. Ridiculous!!”

“Overwhelming disappointment in the whole legal system”

“I had little to no help from free services and paid for services didn't get back to me, so I was on my own!”

“it has all been left in my hands, and it is quite daunting. I have been told to apply through VCAT and as I am ill it is causing me to be very stressed out, and exacerbate my illness. I feel no one really helps out...a lot of time and energy wasted. I have been through this a fair bit and with all the rejections and paperwork i have done, in the hope that i will receive some help it makes me so upset that I did not qualify at any stage with anyone!”

“No , I wander around the legal maze occasionally bumping my head into a sharp corner , it hurts..... I am persistent in acquiring some assistance.....and my legal problem still exists, unfortunately”

“I do not know why Australians pay so much tax and give so much but are not adequately supported by the very system that penalises them”

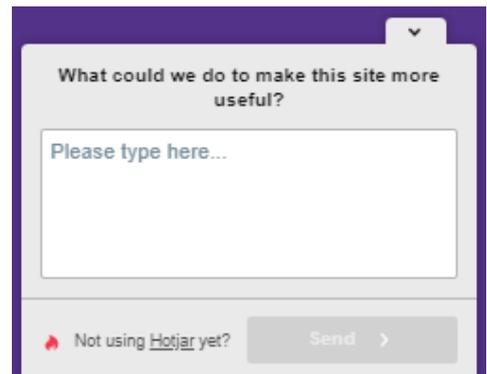
“No I spent two years seeking help and thought justice connect was the place I would find it, but sadly not. My legal problem is still just that. It turns out, being on a pension doesn't afford you legal representation.”

3. Hotjar on-page and in-tool Survey

This poll asked users “What could we do to make this page more useful?” via a tab at the bottom right of the justiceconnect.org.au/help page.

30 people responded. Responses were not overly constructive. Many answers were from people that seemed to be desperately looking for help, and some people did not seem to realise the function is a survey rather than linked to a live chat with a human.

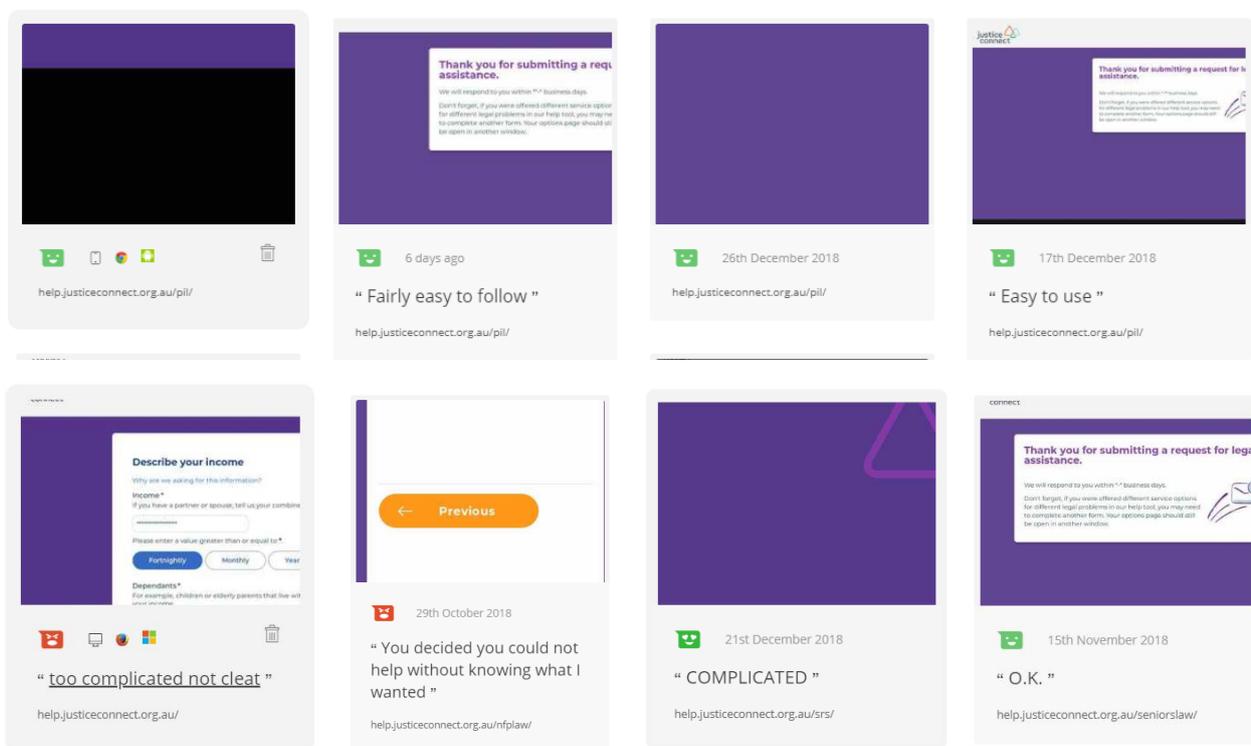
Help seekers can also provide feedback throughout the help tool be picking a rating for how satisfied they are and including optional free text. This is done by clicking on a box and selecting an icon that

A screenshot of a Hotjar on-page survey poll. The poll title is "What could we do to make this site more useful?". Below the title is a text input field with the placeholder "Please type here...". At the bottom of the poll, there is a "Send" button with a right-pointing arrow and a small icon of a flame next to the text "Not using Hotjar yet?".

represents how they are feeling toward the tool. The icons are small smiley faces showing various emotions, including angry, unhappy, neutral, happy and in love.



A representative sample of feedback on the intake tool is set out below:



4. Insights from Hotjar data

While we believe that the Hotjar feedback is less useful than other feedback we have received, we have drawn some insights from the feedback as follows:

4.1.1 There is confusion on what the Hotjar feedback mechanism is for

The feedback mechanism is intended to receive responses from help-seekers on the help page and provide any information on how to improve the tool. Some users were using the Hotjar feedback mechanism to try to communicate with Justice Connect.

4.1.2 The form is meeting some, but not all users' needs

Some comments indicated that the intake process is too long or complicated. However, we received an equal measure of comments providing positive feedback on the user friendliness of the form. We note that we usually received a negative bias in self-selecting feedback such as Hotjar – a user is more likely to go out of their way to complain than to praise.

4.1.3 Users are frustrated by their individual circumstances or by the fact that we may not be able to provide them with support due to ineligibility.

Help-seekers have used the Hotjar feedback as an avenue to express frustration about their individual circumstance and inability to find free legal assistance.



4.1.4 Help-seekers are hopeful when they reach the end of the Intake Tool and are optimistic that help will be provided.

For a majority of the feedback, positivity is expressed at the end of the intake tool, where a submission is made, but the outcome of that submission is not yet known – this is possibly the point at which the greatest number of users of our tool have the most hope that they will receive legal assistance. Our follow-up survey (supported by data analysis) showed that many users were ultimately assessed as ineligible, and their perspective on Justice Connect and the intake tool may understandably shift at this point.

5. In-person testing

Hallway user testing was conducted in October 2018 in Melbourne, Australia, at Launch Housing St Kilda, cohealth Central City and Fitzroy Legal Centre in Melbourne.

These locations were chosen for testing as many of Justice Connect’s most marginalised and vulnerable clients are referred to us by these organisations and similar organisations.

The testers participating in this suite of testing are not representative of all people with unmet need, but reflect an important cohort of harder to reach, more vulnerable help-seekers who often present with more complex problems (both legal and non-legal).

We asked our testing partner organisations to help us recruit testers while we were present, and to support our testing team and those participating in testing.

The information sought and the data sourced by our interviewers is outlined below. Our script and question set is included at Appendix I.



6. Insights from in-person help-seeker testing

Each interview was summarised and collated into a single document which highlighting key areas of concern that became apparent in testing. Key findings are outlined below. These findings are focussed on areas of difficulty experienced by those testers that did not complete the tool with ease.

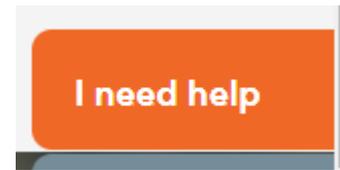
6.1.1 Help-seekers generally like the look, feel and function of the tool

- Help-seekers responded well to the tool. They liked the colours and images. They also liked the buttons in the tool
- When asked if they would recommend the tool to a friend or family almost all said yes.
- Many users clearly understood and navigated through the tool easily.

6.1.2 Disadvantage has some association with lower digital literacy, but not a complete association

- A number of testers at locations dealing with people experiencing chronic disadvantage had very limited technological literacy which negatively impacted on their ability to navigate the tool for example:
 - Some testers had basic issues with navigation included use of “next” buttons or clicking on a link and consequently getting lost
 - A middle-aged man who said that he was not confident with technology took around 20 minutes to get through the tool (which takes on average 3 minutes)

- An older woman who tested the tool on a smart phone didn't understand that a mobile screen is scrollable and that more content is available than that which displays on the screen
- Mental health problems impact on tool interaction:
 - Testers at cohealth and Launch Housing were particularly vulnerable to experiencing mental health issues, and required far greater assistance with testing the tool compared to users at Fitzroy Legal Centre
 - One user who appeared to be affected by substances was unable to navigate the tool
 - Some testers showed signs of delusional thinking, believing questions were conspiratorial
 - Mental health and/or substance use issues affected some testers' concentration and impacted their ability to get to the submission stage without giving up. These testers asked for more assistance and often were unable to complete the form independently.
- Several vulnerable testers had high digital literacy and found the tool very easy to use, moving through the Program Sorter completing forms quickly and easily. Some examples of included:
 - An individual experiencing homelessness, from a CALD background, currently on a day break from inpatient psychiatric care for schizophrenia. This individual had a Samsung smartphone and adeptly managed the intake tool
 - An individual experiencing long term homelessness and intergenerational disadvantage and trauma, who was a regular online user (often at her local library) and was very comfortable with online processes. She completed the tool very quickly and inputted helpful information
 - A middle aged truck driver whose employment had been terminated, and was at risk of homelessness found the tool very easy to navigate, and would highly recommend the tool to a friend.



Note

- Our hypotheses regarding appropriate user cohorts were validated by this research. Some users experience mental health crises are not appropriate targets for an online intake system, and are likely to require the assistance of a legal professional or social worker to access a service.
- It is very important to acknowledge that while certain cohorts (such as people experiencing homelessness) are more likely to be experiencing a mental health problem than the average person, not everyone experiencing homelessness is experiencing a mental health problem, and not everyone experiencing a mental health problem will have trouble navigating an online tool.

6.1.3 Navigation skills varied

- When technological literacy was low, testers clicked on odd links throughout the tool and regularly got lost navigating the tool
- These users made use of the "I need help" button on the right hand side menu (although we note that this button takes users back to the start of the process, so does not actually assist those experiencing difficulties. It indicates that a 'help' function may be used by users struggling with navigation.



Figure 27: Illustrations of help-seekers.

6.1.4 Some features confused users

- Testers were confused by sometimes having “next” buttons to be clicked and sometimes having them automatically clicked based on their answer to a question (e.g. upon a user’s selection of a jurisdiction the form automatically moves to the next page).
- Some testers tried to type in areas where only a tick box selection can be made.
- A number of users didn’t know they should or could write in free text fields in e.g. “something else”
- From the Justice Connect home page, it takes three clicks to get to the substantive start of the intake process. Some testers found this confusing

6.1.5 Legal terminology is not well understood or applied

- Testers experienced particular difficulty responding to the “What is your legal problem?” question. This is consistent with pre-development prototype testing results.
- What a tester perceived to be the legal issue was often very different to our own classification.

6.1.6 Access to the devices is an issue for many vulnerable help-seeker cohorts

- Some testers raised the issue of not having access to either a computer or smart phone.
- However, we also encountered testers who responded positively to our tool and regularly use smart phones.
 - One example was a tester with a chronic, significant mental illness. His illness had resulted in losing his tenancy. He was an inpatient at a mental health hospital during our testing and participated by taking day release breaks to join our research. He explained to us that his smart phone was his connection to the world, and that he used it to stay in touch with family and to connect with services.

6.1.7 Means test was unclear for testers of all levels of capability

- This income assessment step was regarded as complex by a number of testers who sought guidance on how to complete it.
- “Please enter a value greater than 0” confused some users.
- The tool’s pre-selection of income frequency (i.e. weekly, monthly or annually) choice was confusing for some users.
- Casual workers wanted capacity to enter a range as their income changes week to week.

What is your legal problem? *

Please select any of the following categories that apply

- Fines and Infringements
- Decisions are being made against me against my wishes by my legal guardian or administrator
- Credit and Debt
- Guardianship and administration
- Tenancy and Eviction
- Contracts
- Fair work and employment
- Bankruptcy
- Judicial review or administrative law
- Federal Discrimination Law (age, sex, race or disability discrimination)
- Assistance making applications for access to hormone treatment therapy (Stage 2 Access)
- Workplace sexual harassment
- Discrimination in school
- Commonwealth entitlements
- Criminal law
- Compensation claims
- Small business problem
- Complaints about a lawyer
- Visas, migration, asylum seekers
- Something else

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Figure 28: The Program Sorter "legal problem" page.



6.1.8 The “contact another service” card displayed upon an assessment of ineligibility elicited negative responses from help-seekers, but it was also utilised

- Navigating through to this card disappointed and disheartened testers.
- However, testers did follow instructions very literally. For example if there was a link to Victoria Legal Aid, the user clicked on it.
- Testers noticed the external websites were sometimes more difficult to navigate than the intake tool and didn't give them a clear answer to whether they could receive help or not.
- One tester stated they would “Just give up, it is too hard” after googling “no win, no fee” at the suggestion of a “contact another service card”.

Is your only source of income government benefits?

Why are we asking for this information?

If you have a partner or spouse, please answer this question for your combined income (eg is your only source of income as a couple government benefits)

No Yes

Income*
If you have a partner or spouse, tell us your combined income.

Fortnightly Monthly Yearly

Dependants*
For example, children or elderly parents that live with you who rely on your income.

Figure 29: The Program Sorter “means test” page.

7. Recommendations

Notes on hypotheses

- Further validation that many people are comfortable using online channels, including some people in cohorts assumed to not have capacity to use online tools
- Some validation of hypothesis that online provides a quicker and/or superior experience to phone-based intake, in particular based on user survey responses.
- Some queries around whether intake tool is creating greater transparency around Justice Connect's services and eligibility criteria.
- Validation that an online intake tool will work for some, but not all users, and it is important to retain other channels to Justice Connect for more vulnerable help-seekers

Recommendations

1. Continue to offer online channels as these clearly meet the needs of certain cohorts (and are in fact the preference of these cohorts).
2. Work on improving further upfront information on who is likely to be eligible (in particular in relation to the Public Interest Law service which has the lowest conversion rate from submitted entry to receiving legal assistance).
3. Add more questions to flows with high number of submissions but low number of conversion to receiving legal assistance to reduce the number of help-seekers going through whole application process and then assessed as ineligible. This applies in particular to the Public Interest Law Service.

cont over



Recommendations continued

4. Advocate for increased free and low-cost legal services to assist help-seekers who are currently ineligible for any legal support.
5. Improve referral networks and the referral ecosystem to ensure that all help-seekers who are ineligible connect with relevant free services.
6. Test whether users think that Hotjar is a live chat mechanism. If so, consider ways to explain the functions and purpose of Hotjar to users.
7. Consider a redesign of the Hotjar poll and feedback icons and display to encourage feedback about the website or intake tool at appropriate times and to clarify its function.
8. Add new features to assist users to understand what their legal problem is and identify the correct problem category/ies. Natural language processing-based nudging is an option here.
9. Increase the use of tooltips (i.e. having more explanations for terms) could assist. Tooltips could be used not only for the legal categories but to explain terms such as 'ATSI'.
10. Reduce clicks to reach substantive start of form from the home page.
11. Remove the auto next button functionality.
12. Add prompts to free text fields to explain that they can be written in.
13. Reduce complexity of income and assets screen. Add ability to enter average, or range or income is necessary for casual workers.
14. Increase information on why ineligible outcomes have been reached and provide better connection to services where assistance can be provided or be clear that there is not assistance in this sector that can be provided. Consider incorporating the use of empathetic language into delivery of information where no assistance can be provided.
15. Improve linking out to other services by technically and effectively integrating with other service directories as they become available for example the Victoria Legal Aid ORBIT project and projects such as Ask Izzy. We do not have confidence that there is a national plan to create consumer-facing service directories for legal services which limits the success of this recommendation.
16. Encourage overall sector-wide commitment to education around legal problems and use of easy to understand terminology



6. Staff feedback data

1. Staff quantitative data analysis

We have collected quantitative data from staff about their intake processes before and after the release of the intake tool. We aim to gain insights into how the tool is impacting on processing times and staffing burdens etc. As one project aim is to create efficiencies for teams, this is an important measure for this project.

Internal data analysis supports staff observations, with data collected indicating:

- The tool reduces the time it takes to process requests for assistance by between 22%-40% depending on the Justice Connect Program
- Programs that contributed significantly to the tool design process are seeing the tool generate high conversion rates (rates of those make an application converting into those receiving legal assistance).
 - For example, our Domestic Building Legal Service (DBLS) Program form had a very high conversion of 40% of clients who had completed and submitted online applications going on to receive legal assistance. In comparison, only 13% of DBLS phone enquirers converted to clients. This shows the tool is appropriately screening out ineligible help-seekers and narrowing down submitted applications to come from those more likely to be eligible.
 - Our Not-for-profit Law service sees a conversion of 44% of online entries to clients, compared with a conversion of 31.5% from phone enquiries.
- Programs that have less of their whole intake process reflected in the intake tool, have lower conversion rates from submission of online intake entries to clients. This indicates that more time needs to be spent working with these teams to refine questions and add further logic to the pathways.
 - For example, our Self Representation Service runs on a very similar model to the DBLS, but has not built out questions that screen to the same level as DBLS. The Federal Self Representation Service currently only experiences a 12% conversion rate. We note that this program is very keen to build out its intake pathways and we look forward to assessing if this has an impact on conversion rates.

2. Staff evaluation workshops

The workshops were comprised of three main parts:

1. Staff were asked to respond to questions by placing post-its against the following questions. They were then asked to go around the room and review each other's' answers and add to them, tick them if they approve, and add comments to elaborate or disagree. See Appendix II for questions.
2. We then held a group discussion talking through some of the themes that had emerged
3. Staff were then asked to complete the session with two brainstorming questions
 - If money was no object, I would... for intake and triage
 - My wild idea for intake and triage is...

Questions were asked in a deliberately open style to encourage different interpretations and perspectives to be surfaced in the feedback process. Some very clear and consistent insights emerged which are explored below.



3.2 Better service delivery for help-seekers

Staff believe the tool is creating greater consistency of information provision and consistency of intake and triage outcome

Staff acknowledged there has been inconsistency in the application of program guidelines in intake and triage. The tool is a positive step towards a more consistent and transparent application of guidelines.

The tool could be expanded and extended to direct help-seekers in more targeted ways to information resources

Staff are seeing tool users engage with online resources that they are directed to in the tool process. They are keen to extend the tool's pathways and directly link both eligible and ineligible help-seekers with self-help resources at Justice Connect and at other organisations.

3.3 Program efficiency

The tool is reducing the number of ineligible requests for assistance received in most Programs

Staff perceive they are interacting with less ineligible help-seekers as they are being automatically triaged by the help tool. This boosts their capacity and they also believe their time is being spent more effectively.

For most Programs, the tool is resulting in significantly less time spent on the phone with help-seekers overall

Staff perceived that they were spending less time on the phone with help-seekers. See quantitative data above that confirms this position.

The flexibility in editing and updating the tool is good

Staff noted that the ease with which the intake tool could be edited and updated was very positive, and that they had appreciated being able to add or remove questions (via the Innovation team) as services changed over the six-month period.

The tool is valuable for training new starters

Enquiries and applications received from the tool can be used as examples and discussed prior to calling or emailing the help-seeker. In this way, senior staff can provide guidance around approaches to further questioning and dealing with certain kinds of help-seekers.

While processes have improved and time saving are being realised, there remains inconsistency in approaches and still some double handling of information and processes

Staff discussions and workshops revealed that our Programs had integrated the tool into their processes in different ways, and with varying levels of success.

The teams that had engaged more with the design process had generally also integrated the tool more clearly into their overall service processes, and provided tweaks to the service models where necessary.

Some staff were calling help-seekers who had made online applications and using old phone intake interview structures, meaning they were re-asking questions that help-seekers had already answered online.

3.4 Promotion should be a priority

We need to better promote the tool in our referrer networks

Staff were in agreement that we need more promotion of the intake tool within our referral networks. This aligns with our data discussed at section 3.1 which shows that our referral-based services have low intake tool usage and engagement.



Staff are keen for more public awareness raising campaigning and referrer awareness raising campaigns

We did not undertake a major awareness-raising campaign, as we wanted to ensure we were pushing help-seekers to apply using a tool that works smoothly. Staff have requested that we undertake more promotional activities to encourage help-seekers to find and use the tool. This is a positive endorsement of the tool by staff.

3.5 Room for improvement

Help-seeker categorisation of legal problems is a problem area

Staff have noticed that help-seekers are frequently miscategorising their legal problems. This is consistent with our help-seeker testing data.

Help-seeker descriptions of legal problems is a problem area

Staff noticed the usefulness of answers to 'please describe your legal problem and the help that you need' varies between applications. Some provide relevant and useful information, while some provide only a few lines.

In the initial product development stage, staff had been concerned they would receive too much information from help-seekers, so the tool was designed to limit the amount of free text information provided. On reflection, staff believe help-seekers may need more opportunities to explain their issue and help required so they can articulate themselves and provide more information.

Where help-seekers are providing very little information, staff are generally choosing to follow-up with a phone call, which is largely similar to a non-online intake call. Staff will consider strategies of either calling them back, sending an email asking for further information and suggesting they call us if they would prefer a phone-based intake.

The means test is not generating helpful answers in some cases

Staff have noticed that some help-seekers are entering incorrect information at the means-test stage, or are entering 0 in every field (essentially not answering the question). This is consistent with our help-seeker testing and Hotjar responses which indicate help-seekers have difficulty answering this question.

The interface for staff could be improved to highlight important information

The tool uses basic form entry configurations to manage the back end of forms, with a few extra features. Staff reflected that this interface could be improved for ease of use and navigation. This will be a priority in our second iteration.

A progress bar would be good from both a help-seeker perspective and for Justice Connect staff

Staff feel that help-seekers would benefit from reassurance about their progress through the tool.

3.6 Additional feedback

Some areas of feedback that were more contested:

- One Program said they have trouble contacting help-seekers after they made online applications. They believe the online form may be used by people with problems to simply feel like they have progressed, but then do not want to continue with the intake and triage process.
- Too many ineligible help-seekers are getting through to submission.
- Low conversion of submissions to actual files (this was only mentioned by one Program).
- High number of help-seekers coming through Google is new, and positive.
- Framing of the tool may be setting help-seeker expectations too high.



4. Recommendations

Notes on hypotheses

- Validation that the intake tool can reduce the burden of administering online intake, but only where service invests in building out question flows.
- Validation that structured intake can enable help-seekers to self-enter data into our data standard, ensuring better data consistency at enquiry and intake stages, and less work for staff in cleaning up records. Has also enabled APIs to be developed from our online intake to our CRM.
- From a staff perspective, there is validation that the tool can provide more consistent enquiry outcomes by clarifying eligibility criteria and reducing subjective assessments.

Recommendations

1. Promote the online intake tool with our legal and non-legal referral network
2. Increase number of self-help resources and create topic 'hubs' that help-seekers can be directed to via the online tools. Create more pathways from or intake tool to self-help resources.
3. As per recommendation out of help-seeker testing, simplify the means testing, improving user friendliness and likelihood of accurate completion.
4. In future iterations, ensure that all Programs have appropriately reviewed their intake processes, and made appropriate adaptations so that the online intake tool is seamlessly integrated into the intake process and provides the best user experience possible.
5. While adding a progress bar is not easily achievable as each journey through the tool is different and not linear, it would be possible to flag the key milestones that a user has progressed through in the tool. This will be considered for the second iteration.
6. Improve guidance to help people to self-identify the legal problem category/ies that apply to their issue
7. Add a few extra categories that describe some recurring issues that Justice Connect cannot assist with (e.g. providing representation to oppose an apprehended violence order, or providing advice on family law property settlements) to reduce frustration for these users
8. Make links to pages explaining Justice Connect's services and how the organisation fits into the broader justice ecosystem more clear
9. Build further links to other directories and sources of free legal assistance for those who are not eligible for assistance

Appendix I – in-person user testing

Introduction script

Our testers were first given an introduction, informally structured in this way:

My name is X, I work at Justice Connect as a coordinator for our digital projects. Justice Connect is a not-for-profit organisation that provides legal services.

We have made an online tool to help people better access the right service from Justice Connect. It is live and people are already using it on our website, however we are looking to improve the tool and make sure that it is working as best as it can. That is why we would like you to test it.

You are simply testing the tool (you are not really submitting a legal problem). We just want to understand your reactions to it. There are no right answers. If it is difficult or doesn't make sense, that is because we have done a bad job.

The tool is designed to help people to apply for legal help from Justice Connect online.

It would be good if you could go through the tool using an example from your experience.

If you can't think of any legal issue to use, possible suggestions are:

- › *You have an outstanding bill with the electricity company that you don't think you should pay*
- › *You have an issue with your ex-landlord and they are refusing to give your bond back*

If the person approached agreed to participate, they were provided with an information sheet, and invited to start using the tool on either a phone or tablet.

Questions asked

Interviews were deliberately structured to flow in a flexible and informal manner because they were conducted at the same time the user was testing the tool.

In this manner, pre-written questions were drafted simply so that they could be adapted in-person, and additional questions were put to testers as new issues became apparent.

This was important to encourage the tester to be able to engage freely with the intake tool while also providing feedback in real-time.

The interviewer was also told to make notes on non-verbal feedback, such as when and why the help-seeker was stuck, frustrated, satisfied, when they couldn't progress further, or if there were any other issues.

Below are some of the questions asked during the interviews.

General questions:

1. What are you finding difficult?
2. What are you thinking?
3. Would you be comfortable using a system like this to apply for legal help online?
4. What do you like about it? What do you not like about it?
5. Do you have a smart phone?
6. Do you use the internet?
7. Where do you most often use the internet? What device/where would you be most likely to use a prototype like this?



8. Would you rather use a system like this with some help than alone? Who would you be most likely to ask for help?
9. Would you use it?
10. Would your friends and family use it?

Design questions:

11. Do you like this design?
12. What do you like about it? What do you not like about it?
13. How does the tool's design make you feel?
14. What colours would you like to see more of?



Appendix II – questions asked in staff workshops

The questions asked of staff were:

1. What has changed in your work or role since the intake tool was released?
2. What is your favourite thing about the intake tool?
3. What is your least favourite thing about the intake tool?
4. What would you like to add to the tool?
5. How are you finding the notification emails and staff dashboard?
6. Who is using the intake tool (internal and external)?
7. Who is not using the intake tool (internal and external)?
8. What are the biggest pain points in the intake and triage process (both online and offline) for staff?
9. What are the biggest pain points in the intake and triage process (both online and offline) for help-seekers?
10. How can we help more people reach the tool?

