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Title:
Legal Wellness Checkups: Delivering Preventive Law Through Cutting Edge Technology

Presenters:
Kirsten Jacobson, Tennessee Alliance for Legal Services, Nashville, TN
Ann Pruitt, Tennessee Alliance for Legal Services, Nashville, TN

Through collaboration with legal providers, social services, and technology innovators, TALS implemented an automated legal wellness checkup to provide preventive, holistic services to low-income communities. This session navigates the benefits, barriers, design, and implementation process of artificial intelligence and logic-based legal wellness checkups.
Wellness Checkups in Legal Services:
Delivering Preventive Law Through Cutting-Edge Technology

Ann Pruitt, Executive Director
Kirsten Jacobson, Equal Justice Works Fellow
Tennessee Alliance for Legal Services
Session Agenda

• What is a Legal Wellness Checkup?
• Goals for TALS’ Legal Wellness Checkup
• Role of Wellness Checkup in our program
• Design Process and Technology
• Demonstration & Discussion of Initial Implementation
"No, Johnny, it's 'an apple a day keeps the doctor away' - not 'an app a day.'"
Goals of TALS’ Legal Wellness Checkup

• Holistic questionnaire used to identify areas of legal risk

• Educates public to see legal solution for problems

• Automated to use variables and logic to connect facts, demographic data, and legal information available through TALS’ resources

• Serves prevention and intervention functions through www.HELP4TN.org portal

• Generates customized report
Opportunity: Pilot Project Creating Cycles of Success

• Three Partners, Streamlined Intake
  • TN Dept. of Human Services
  • TALS
  • Memphis Area Legal Services

• Goal
  • Improve overall wellbeing of mutual clients: cycles of success

• How?
  • Design services based on 2Gen, brain science principles, strengths-based approach
  • 50-75 TANF families in cohort; 2 year project
Prescriptive Model of Legal Services:
I got an eviction notice. Help!

OK, we can help you with that. We will do some intake and eligibility screening, then open the case file.
Times are really tough right now.

I hope I get back the right amount of tax money. How long will taxes take? Maybe I should get an advance on my refund.

The car broke down for good this time. I can’t get the kids to school on time. Sometimes they don’t make it at all.

I can’t get to work on time. I hope I don’t get fired.

I tried to get a loan for a car, but it was denied because of bad credit.

I think my ex opened a credit card in my name.
Prescriptive Model of Legal Services:

- Attorney will help client in court, including writing documents
- May help Client find new housing
- Solution mainly focused on solving crisis
- File closed at end of case

- Identity Theft
- Tax Preparation
- Transportation Issues
- Children’s Education
A Preventive 2Gen Approach to Legal Services:

- Assess Legal Risks
- Maintain Relationships
- Engage Family
- Build Capacity
1. Assess Legal Risks

- Complete Legal Wellness Checkup
- Identify client’s priority issues
- Determine other areas of legal risk
2. Engage Family

• Use Legal Wellness Checkup to screen for issues in the immediate family, including children and seniors
• Identify additional areas of legal risk and needs
3. Build Capacity

- Refer client to proper legal and social service resources
- Collaborate with client to determine next steps
- Coordinate between different groups and agencies
4. Maintain Relationships

- Legal Concierge services
- Help available 24/7:
  - HELP4TN.org
  - 1-844-HELP4TN
- Cohort education
5. Achieve Goals

- Simplify process of getting legal and social services
- Provide prevention and earlier intervention
- Empower self-help
- Support for the entire family
- Create cycles of success
Legal Wellness Checkup: Design Process and Technology
The Tool

• Covers topics relating to legal needs in plain language
• Written in consultation with subject matter experts
• Generates personalized report based upon areas of risk and demographics
<table>
<thead>
<tr>
<th>DEMOGRAPHICS</th>
<th>FINANCIAL LITERACY</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONSUMER &amp; DEBT</td>
<td>INCOME &amp; EMPLOYMENT</td>
</tr>
<tr>
<td>FAMILY &amp; CHILDREN</td>
<td>MILITARY &amp; VETERANS</td>
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<tr>
<td>HEALTHCARE</td>
<td>NON – CITIZENS</td>
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<tr>
<td>HOUSING</td>
<td>SELF-REPRESENTATION</td>
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</tbody>
</table>
Family And Children

1. Are you married?
   Yes ☐   No ☐

2. Are you planning to file for divorce?
   Yes ☐   No ☐

3. Do you have any children?
   Yes ☐   No ☐

4. Are there any adults in your family that cannot make their own health care or money decisions?
   Yes ☐   No ☐

5. Does anyone in your house ever make you feel scared or afraid?
   Yes ☐   No ☐

6. Do you worry about the safety of your family?
   Yes ☐   No ☐

Sections:
- Basic Information
- Employment/Income
- Debt/Consumer
- Financial Planning/Tax
- Families and Children
- Healthcare
- Housing
- Other
- Citizenship (if applicable)
- Veterans/Military (if applicable)
Thank you for completing the Legal Wellness Checkup. You are on your way to making sure that your legal wellness continues to improve. Making sure that you take care of legal issues as they come up, and keeping new problems from happening, can help you lead a happier, healthier life. While this is not legal advice, the following resources are available in your area to help support you:

1. **Divorce without Children**
   You said that you are currently married and may need a divorce soon, but you do not have any children. The state of Tennessee has forms for divorce without children. You can use these links to see if you are eligible to use these forms. These links will take you to those forms and give you more information about divorce in Tennessee.
   - [Court Forms: Divorce without Children](#)
   - [HELP4TN Divorce Information](#)
   - [Divorce in East Tennessee](#)
Forming Partnerships – Technology Vendors

**What We Wanted:**

- Established software company with workable software design
- Software based in artificial intelligence and conditional logic
- Cutting edge technology with additional features available in the future; adaptable to future technologies
- Capability to add preferred features, like tracking usage
- Ability to make changes and updates independently (no code needed)
- Price to fit our budget and time frame to meet our schedule
What We Wanted to Provide:

• Single application: easy to use and easy to understand
• Visually appealing for users
• Available online; mobile and desktop compatibility
• Thorough questions, but not repetitive
• Survey that could be completed in less than 20 minutes
Selected Platform: Neota Logic

• Built upon prior relationships between TALS and NEOTA
• Developed for legal automation
• Uses no-code back-end so that providers can edit and improve
• www.neotalogic.com
Questions

Variables

Issues

Demographics

Resources

Legal Aid Office

Output (Report):
Checkup Demonstration
Example 1

• Shawna is a 19 year old living and working in Nashville. She comes to a local VITA clinic to get help with tax preparation. She completes the Legal Wellness Checkup while waiting to get tax help.

• She has built up some credit card debt, and is worried about the debt collectors that keep calling her. She also has trouble paying her utilities sometimes. She has student loans that she is having trouble paying and is thinking about taking out a payday loan to help make ends meet until her next paycheck. She hopes that she get her financial situation turned around so that she can buy a car soon.
Legal problems can really pile up.

HELP4TN makes it easy to protect your legal wellness.

1. Take Checkup
Go to www.HELP4TN.org.
You will learn about your legal rights and areas of risk. Take a legal wellness checkup at least once a year and after a major life event.

2. Get Information
Use www.HELP4TN.org to learn about protecting your legal rights. The Legal Wellness Checkup gives you links to booklets, forms, and videos to explain your rights.

3. Ask Questions
www.HELP4TN.org makes it easy to ask a lawyer questions—for free! Just go to www.HELP4TN.org to get started.