MPLP IT Fifth Friday Webinar: Next Level Pika Texting

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Angela Tripp and Scott Ellis March 29, 2019

Fifth Friday Webinar Series

Schedule for remainder of 2019:

- May 31, 2019
- August 30, 2019

Recordings of and supporting materials for previous webinars available at:

• <u>http://www.mplp.org/Taskforces/technology</u>

Basic Elements and Roadmap of Training

- 1. Quick review of how to Send and Receive Texts with Pika
- 2. In-depth Look at How to Send Automated Reminder Texts and Survey Links
 - a. Implementation and Policy Considerations
 - b. FAQs
- 3. Technical Aspects of Texting with Pika
- 4. Next-Next Level: Texting for Outcomes
- 5. Questions!

Texting through Pika!

- You have the option to text with your clients using the Pika interface
- You initiate the conversation, all conversation is recorded in Pika
- You get email notification of new messages; you can also see in Pika which cases have unread messages
- Text conversations recorded in Pika SMS tab as well as Notes tab
- When case is closed, clients can no longer text you
- Ability to schedule and send automated text reminders for events (court dates, meetings, etc.) and send survey links

Requirements for MI programs

- Pika 6.x
- Twilio Account
 - Dedicated phone number(one per instance)





Texting with Clients: Pika SMS tab

m Pika CMS 6 Demo	
A-17-00262 Pending	Outcomes Justice Gap SMS
Kathy Brown Primary Client Address: , Phone: (617) 970-4311 Notes: Language: Birth Date: 3/3/1981 • remove	Send a SMS message to a case contact Cell Number: Kathy Brown (617) 970-431 • Message: Please enter your message here.
Amy Brown Client ► remove	Send SMS from Kathy Brown Hi Iscc!!
Actions	at (617) 970-4311 12/13/2017 2:42 PM
Popup Timer Add Tickle Add LSC Other Matter Email Case Link Transfer this case Duplicate this case	from Kathy Brown Hi LSC! at (617) 970-4311 12/13/2017 2:41 PM
Delete this case Add to this case: Client First:	from Kathy Brown at (617) 970-4311 12/13/2017 12:50 PM
Middle:	to 13135951003 Thanks so much! from 12164506604 12/13/2017 12:46 PM
Last (or Ord_Name):	

Client View





Notifications for You

m Pika CMS 6 Demo

ase Number	Client Name	Status	Staff	Office	Code	Opened.	Closed	Funding	1
-17-00262 pen	Brown, Kathy	Pending	Tripp, Angela	М		12/13/2017			
-17-002631	Ellis, Scott	Pending	Tripp, Angela	М		12/13/2017			
	HIGAN				Ar	ngela Tripp <tri< th=""><th>ppa@lsscm</th><th>org></th><th></th></tri<>	ppa@lsscm	org>	
Mice New SMS for messages	HIGAN YOCACY JORAM				Ar	ngela Tripp <tri< th=""><th>ppa@lsscm.</th><th>org></th><th></th></tri<>	ppa@lsscm.	org>	
New SMS for 4 messages	HIGAN YOCACY JGRAM or A-17-00262 egalaid.org <no-reply .org</no-reply 	/@bestlegalai	d.org>		Ar	ngela Tripp <tri Wed, Dec 13,</tri 	ppa@lsscm. 2017 at 12:4	org>	

o Opposing Parties Have Case Summary	Been Entered
A-17-00263 Pending	
new SMS message:	5
Scott Ellis Primary Client Address:	
, Phone: (617) 970-43 ' Notes:	11
Language: Birth Date: ▶ remove	
Antione	
Popup Timer	[

Notes Tab

Case Summary	Notes Conflict Eligibility Case Info Pro Bono	Documents LITC
A-17-00262 Pending	Outcomes Justice Gap SMS	
	Summary (public):	Hours:
		1
Kathu Braum	Notes (private):	Date:
Primary Client		03/28/2018
Address:		Start Time:
, Phone: (617) 970-4311		10:31 AM
Notes:		Type of Activity:
Birth Date: 3/3/1981		•
► remove		Staff:
		Tripp, Angela
A		Funding Source:
Client	► Text Highlighting	
	Save	
► remove		
	Case Notes for A-17-00262	
Actions	Reverse Order of Case Notes	
Popup Timer	Case Note - Tripp, Angela	
► Add Tickle	12/13/2017 2:43 PM 0.00 hours Edit this record	
Add LSC Other Matter Email Case Link	other cse notes	
 Transfer this case 		
 Duplicate this case Delete this case 	SMS Message -	
Add to this case:	12/13/2017 2:42 PM 0 hours Edit this record	
Client	[SMS message from Kathy Brown at (617) 970-4311]	
First	misce:	
i not.	SMS Maaaaaa	
Middle	12/13/2017 2:41 PM 0 hours Edit this record	
Middle.	[SMS message from Kathy Brown at (617) 970-4311]	
Last (as One News)	Hi LSC!	
Last (or Org. Name).		

Texts from Clients without an Open Case

Clients who change phone numbers without telling you, whose cases have been closed, or who have no current open case may try to text. When they do, they will get a message that says "Thank you for texting us! We couldn't find your phone number in any of our open cases. Please call our office at (XXX) XXX-XXXX." You can create a custom message for your program's needs. No one within your program is notified of this texting attempt.



Questions?

Automated Reminder Texts

Use cases:

- Reminders of appointments
- Reminders of court dates
- Reminders of actions clients need to take (e.g., in a divorce clinic, reminders of service, default, etc.)
- Sending link to online survey
- Others what can you think of?



New Calendar Entry

ummary (public):	Date:	
Court Hearing	06/17/2018	SMS Reminders
otes (private):	Start Time:	Send SMS reminder to the
	10:45 AM	primary client on this case?
	End Time:	Ţ
		Send the SMS reminder to: Primary Phone
	Type of Activity:	
		Alternate Phone
	Staff:	Select a Message
	Tripp, Angela	× • • • • • • • • • • • • • • • • • • •
	Case:	Extra message for the client
Text Highlighting	Client, Casey - 1-18	8-00119 - (max. 255 characters):
	Funding Source:	
		•

Scheduling and Crafting your Reminder

Cancel

m MPLP Dev Pika 605

🔒 atripp 🛛 Lo

Summary (public):	Date:		
Court Hearing	/ 06/17/2018	i	SMS Reminders
Notes (private):	Start Time:		Send SMS reminder to the
	10:45 AM		primary client on this case?
	End Time		▼
			Send the SMS reminder to:
	Type of Activity:		I findly from
		•	Alternate Phone
	Staff:		Select a Message
	Tripp, Angela	٣	Hello, this is Legal Services, 🔹
	Case:		
► Text Highlighting	Client, Casey - 1-18-00) <mark>119 - v</mark>	Hello, this is Legal Services, reminding you about (max. 200 characters):
	Funding Source:		Please remember to bring your sister who is going to testify for
		Y	you.
			li

What the client sees

This is a long message that was divided up into two messages; even if it arrives out of order the messages are numbered to help the client read in the proper order.

You can see the canned message, the date and time, and my additional free text. The "Thank you!" is added automatically but can be changed by your Pika admin. 💵 Sprint 🗢

<

12:30 PM

1 74% 🔳

(734) 547-6634>

1/2 Hello, this is Legal Services reminding you about your court date. Please arrive at least 30 minutes for your court date:

DATE: 3/28/2019 TIME: <u>1:00 PM</u>

2/2

Please remember to bring a certified copy of your driving record.

Thank you!



Closing a case and sending a survey

You can use automated reminders to send clients a link to an online survey. You can build a simple survey in something like Google Forms (free), SurveyMonkey, or others. When you close a case, you can schedule the survey text to be sent. The url will automatically become a link.



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Summary (public):	Date:	Jan
Meeting at YCUA office		ler
Notes (private):	Start Time: Send SMS reminder to	the
	11:30 AM primary client on this ca	ase?
	30 minutes before Sta	art Tir
	Send the SMS reminde	r to:
	Primary Phone Type of Activity:	
	Alternate Phone	
	Staff.	
	Tripp, Angela	
	// Case: 1-18.00119	
Text Highlighting Delete this record	Client, Casey - 1-18-00119 - T (max. 255 characters):	client
	Funding Source: We're meeting at the Y	YUC
	office at 1234 Main St. Please bring proof of I	reet.
3		
	Device des faits das se	
	Jun 17 2018 11:00	DIE

ıtripp

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Last (or Org. Name):

Jr., Sr., etc.

Date of Birth:

Case Notes for 1-18-00119

Reverse Order of Case Notes

Appointment - Tripp, Angela 6/17/2018 10:45 AM | 0.00 hours | Edit this record

Court Hearing

SMS Message -

6/17/2018 10:28 AM | 0 hours | Edit this record

[SMS message from Casey Client at (617) 970-4311] Sorry I can't make it!

SMS Message -

6/17/2018 10:15 AM | 0 hours | Edit this record

[SMS message to 16179704311 from +17348871493] Hello, this is Legal Services, reminding you about your court date. Please remember to arrive 45 minutes before your scheduled time. Your court appointment is:

DATE: 6/17/2018 TIME: 10:45 AM

Please remember to bring your sister who is going to testify for you.

Thank you!

Add

SSN:

Using or Clearing Appointments from Your Calendar

MPLP Dev Pika 605 m Go to date: Go Day View One Week Four Week Advanced < Previous Day Next Day > **Overdue Items** Actions Add New Tickle Add New Time Slip (Popup Timer) 6/17/2018 Meeting at SSA Office 1-18-00119 Appointment Add New Calendar Entry 11:45 AM Client, Casey Add New LSC Other Services Record (617) 970-4311 Subscribe to Calendar (iCal) View Another Person's Calendar: **Today's Pending Items** Tripp, Angela View Appointment 4:35 PM Meeting at FOC 1-18-00120 Client, Carmen (617) 970-4311 To Do List No entrico [Check All / Uncheck All] Update Time Slip and Activity Log for 6/19/2018 (0 hours) Time/Funding Breakdown No entries No time slips

Using or Clearing Appointments from Your Calendar

	Dev Pika 60	5						
< Previous Day	Day View C	One Week	Four Week	Advanced	Go to date:		Go] Next Day >
Today's Pen	ding Items						Actions	
Appointment	4:35 PM Meetir	ng at FOC	066661100 1-18-00120 Client, Carmer (617) 970-431		Cmplt His	\supset	 Add New Tickle Add New Time Slip Add New Calendar Add New LSC Oth Subscribe to Caler View Another Pers Tripp, Angela 	o (Popup Timer) r Entry er Services Reco ndar (iCal) ion's Calendar:
No entries							View	
Update					[Check A	II / Uncheck All]		
Time Slip an	d Activity Lo	g for 6/19)/2018 (2 ho	urs)			Time/Funding B	Breakdown
Time Slip	4:06 PM	Meetir	Description	1-18-00 Client, 0 (617) 9	Dase Info 1120 Carmen 70-4311	2.00	Eunding Code No Funding Code	Hours 2 hours
Appointment	4:35 PM	Meetir	ng at FOC	1-18-00 Client, 0 (617) 9	120 Carmen 70-4311			

Using or Clearing Appointments from Your Calendar

Email Case Link

٠	Т	ra	ns	fe	r t	his	ca	ise

- Duplicate this case
- Delete this case

P Aud to this case.	٠	Add	to	this	case:
---------------------	---	-----	----	------	-------

Client	•
First:	
Middle:	
Last (or Org. Name):	
Jr., Sr., etc.	
Date of Birth:	

0	0	NI	
0	3	IN	

Add

► Toggle Mileage Detail

Odometer Ending:	
Location:	
Save	

Time Slip - Tripp, Angela 6/19/2018 4:06 PM | 2:00 hours | Edit this record

Meeting at YCUA
Here is what happened.

Appointment - Tripp, Angela 6/19/2018 4:00 PM | 0.00 hours | Edit this record

Meeting at YCUA

Adding and Editing Reminder Message Content

Reminder messages are stored in an OCM system table- "menu_sms_messages". Pika Administrators can add or edit its contents via the "Menu and Special Tables" utility (Site Map->Menus and Special Tables->Menu Listing->sms_messages):

Î	MPLP Dev Pika 605	🖺 ofosubk	Log Off	Shortcuts -
Editi	ng: menu_sms_messages			
Switch	to Classic Mode Add New Menu Item			
Value	Label		Action	IS
1	Hello, this is Legal Services, reminding you about your court date. Please remember to arrive 45 minutes to your scheduled time. Your court appointment is:	before E E	dit Delete)own	Up
	Pika Home > Site Map > Menus > Editing menu_sms_messages			

Adding and Editing Reminder Message Content

To add a new menu item, click "Add New Menu Item":

m MPI	P Dev Pika 605	🔒 ofosubk 🛛 Log C	off Shortcuts -	MPLP Dev Pika 605
Editing: I	nenu_sms_messages			Editing Menu: menu_sms_ Value:
Value 1 Hell you	Label), this is Legal Services, reminding you about your court date. Please remember to arrive 45 minutes be scheduled time. Your court appointment is:	Ac efore Edit De Down	tions lete Up	2 Label:
	Pika Home > Site Map > Menus > Editing menu_sms_messages		-	We haven't heard from you in a while, and you haven't responded when we tried to reach you. If you need help
Choos sequer Enter the "la to 512	e the next available number in nce, enter a number in the value field. the reminder message content within bel" field (note: field entry is limited characters). Click "Update" to save the			after your case is closed, call 1-888-783-8190; we will close your case if we don't hear from you by:
new n	ienu item.			Update

messages

Adding and Editing Reminder Message Content



To edit an existing menu item, click "Add New Menu Item":

Image: WPLP Dev Pika 605 Image: of osuble Log Off Shortcuts Editing: menu_sms_messages Switch to Classic Mode | Add New Menu Item Actions Value Label Actions 1 Hello, this is Legal Services, reminding you about your court date. Please remember to arrive 45 minutes before your scheduled time. Your court appointment is: Edit | Delete | Up | Down Pika Home > Site Map > Menus > Editing menu sms messages Edit | Delete | Up | Down

Edit the reminder message content within the "label" field (note: field entry is limited to 512 characters). Click "Update" to save the edited content.

FAQs for Automated Reminder Texts

- 1. Can clients respond to an automated text?
 - a. Yes, and the response is treated like any other text you get reminders by email and in Pika, and the reminder text and any response are recorded in the SMS tab in Pika and in the Notes tab.
- 2. Who can schedule a reminder text?
 - a. Anyone with access to your Pika instance students, admin staff, etc.
- 3. Who can edit/change the texts that go to clients?
 - a. Anyone with administrative rights within Pika.
- 4. Can I change the order of canned text/date & time/free text?
 - a. No.

How to Get Started

- 1. Make sure you have Pika 6.x. If not, work with MPLP IT for an upgrade ASAP!
- 2. Get a Twilio account and work with MPLP IT to configure your Pika instance for texting.
- 3. Determine as an organization what automated reminder texts you want to build into your Pika instance, and have an administrator add them. Build an online survey if that is part of your plan. Modify all other stock texts (no open case text, determine if you'll use the "thanks we got your text message, etc.).
- 4. Make sure your staff emails are in their Pika user accounts.
- 5. Train your staff (or share training videos).
- 6. Go!





The Technical Parts: Twilio

Texting with Pika is facilitated by the Twilio platform, which provides an API, SMS number and carrier services. Each legal services program must create and maintain a Twilio account. Service costs include a \$0.0075 charge for each text message sent or received and a recurring charge of \$1.00/month for the SMS phone number.

To create a Twilio account for the Pika SMS module, request an SMS number and obtain SID and token information.

 <u>Create a generic trial account</u> (choose "Other" for product and build type, "Less than 100,000" monthly interactions)

io			
S	ign up for free		
	irst Name	Last Name	
c	ofosu@lsscm.org		
•		•••••	
240			
C	ther		\sim
WI	HAT ARE YOU BUILDING?		
	ither		\sim
CH	OOSE YOUR LANGUAGE		
	m not a developer		\sim
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F	ΉP		=
F	ython		
C.	2#		
	ava IavaScript		
1	Vode.is		
	h des s		-

Configuring your Twilio Account

- 2. <u>Verify the registered contact number</u>- <u>from Twilio support</u>: "When you sign up for a your free Twilio Trial, you'll be asked to verify your phone number. This is an important security step that is mandatory to trying Twilio. You must verify any non-Twilio phone numbers that you wish to send SMS or MMS messages to while in trial mode. This is an extra security measure for trial accounts that we **remove once you upgrade** your account."
- 3. <u>Request a new SMS number</u>- Click "Get your first Twilio phone number" <u>from Twilio support</u>: "If you don't like the number Twilio selects for you, you can search for another Twilio phone number instead. Click on the 'Search for a different number' link to reach the phone search interface where you can find a number that better suits your needs. You can customize country, area code, or capabilities."

	rour first Twillo Prio	le number		~
COUNTRY	United States (+1)	Can't find th Please let us	e country you need? know.	
Number >	/ 734	MATCH TO	First part of number 💊	. 6
CAPABILITIES	ANY I Voice Fax Different numbers have different communication needs.	SMS spabilities. Se	MMS lect the ones your phone num	ber

Buy A Number - Search Results								
📕 🗸 Number	√ 734				Capabilities 🗸 Search			
NUMBER	TYPE	CAPABI	LITIES					
LOCATION		VOICE	SMS	MMS				
+1 (734) 636-2378 Monroe, MI	Local	S	F	\boxtimes	Choose this Numbe	r		
+1 (734) 887-1493 Ann Arbor, MI	Local	S	F	\boxtimes	Choose this Numbe	r		
+1 (734) 530-4390 Wyandotte, MI	Local	S	Ģ	\boxtimes	Choose this Numbe	r		
+1 (734) 530-4451 Wyandotte, MI	Local	S	Ţ	\boxtimes	Choose this Numbe	r		
+1 (734) 530-4361 Wyandotte, MI	Local	S	Ģ	\boxtimes	Choose this Numbe	r		
+1 (734) 329-5149 Wayne, MI	Local	S	Ţ	\boxtimes	Choose this Numbe	r		

Your Twilio Account

- 4. Upgrade your account- from Twilio support: "Go to the billing page and provide your payment information. Payment is accepted via credit card or Paypal. Twilio will either automatically charge you whenever your account balance falls below a threshold that you set, or you can buy Twilio credits with individual payments."
- 5. <u>Obtain account SID and authentication token</u>- and give these to Scott at MPLP IT.

PROJECT NAME MPLP Pika/SMS Integration Project ACCOUNT SID ACCOUNT SID Two-Factor Authentication Add an extra layer of protection to your project, with a verification code Image: Imag
Two-Factor Authentication Add an extra layer of protection to your project, with a verification code Instruction DisableD Do not require a verification code
DISABLED Do not require a verification code
ONCE PER COMPUTER Trust computers and only ask for verification cod EVERY LOG-IN We'll always ask for a verification code API Credentials
LIVE Credentials
ACCOUNT SID Used to exercise the REST API AUTH TOKEN © Request a Secondary Token

Configuring the Twilio Account

6. <u>Define a Messaging Webhook</u>- The OCM SMS module utilizes a Twilio webhook to register incoming messages; users must configure Twilio's message "Webhook" setting by entering the following URL as instructed below: https://enter actual Sbase_url value here/services/twilio.php

Go to -> Phone Numbers / Manage Numbers / Active Numbers / Twilio Number / Configure / Messaging / "A MESSAGE COMES IN" / Webhook (HTTP POST)

(i) twi	ilio [.]							DOCS 🗸
MPLP	Pika/SMS I trial 🗸	Phone Numbers / Manage	e Numbers / Ac	tive Numb	<mark>lers</mark> /	UPGRADE	,0 Go to	
☆ # 	Phone Numbers Manage Numbers Active Numbers Released Numbers	PHONE NUMBER LOCATION CAPABILITIES	+17348871493 Ann Arbor, MI U Voice, Fax, SMS	JS , MMS				
	Buy a Number Verified Caller IDs	ACCEPT INCOMING	Voice Calls Webhooks, Tr	wiML Bins	, Functions, Studio, Ser P			
	Use Your Number	A CALL COMES IN	Webhook	~	https://demo.twilio.	com/welcome/voice/	HTTP POST	~
	Addresses	FRIMARY HANDLER FAILS CALL STATUS CHANGES	Webhook	~			HTTP POST	~
	Tools Usage	CALLER NAME LOOKUP	Disabled		~			
	Getting Started	Messaging CONFIGURE WITH	Webhooks, Tr	wiML Bins	, Functions, Studio, or P			
		A MESSAGE COMES IN	Webhook	~	https://pika.mplp.or	g/wmls/services/twilio.ph	HTTP POST	\sim
		PRIMARY HANDLER FAILS	Webhook	~			HTTP POST	~
		Save	Cancel <u>R</u>	elease this	s Number			

Costs and Tracking of Costs

- 1. Costs are estimated at about \$50 per month, but this depends on volume.
- 2. Consider the costs of your Twilio accounts and then add:
 - Each message is \$0.0075 messages longer than 160 characters are double that, \$0.0150.
 - Very long messages (over 1000 characters) are sent as media messages and cost \$0.01.
- 3. To bill offices separately if you need to, consider basing this on the proportion of users in each office.
- 4. Another office-specific billing option is available by running a mega report on sms_count and grouping it by case_county. This is still not perfect, as it doesn't capture the automated "thank you for your message" texts but it can give you a more accurate proportion by which to divide the monthly/annual bill.

Questions?

Next Level - possibly coming in 2020 - Texting for Outcomes

MPLP & MAP applied for a TIG to build a system to engage clients in a texting conversation after their A/B cases are closed to find out whether the info we gave them helped them resolve their problem. This is based on a similar project in Cleveland.

Outcome Msgs: Response Rate



- Overall pilot response rate (based on individuals): 61.9%
- Overall pilot opt out rate (based on individuals): 5%



Pro Se Divorce Clinic (32A)

People Sent Messages

People sent messages People responding (not out/stop) People responding out/stop 96

"Yes"

"No"

Response Rate: 79.2%

Message A: You recently attended a legal clinic for help filing for divorce. Did you file your papers with the court? Text Y or N to let us know.

Message B: You recently got legal help filing for divorce. Did the other party get served? Text Y or N to let us know. Text SERVICE HELP if you have questions.

Message C: You recently got legal help to file for divorce. Was your divorce granted? Text Y or N to let us know.

Eviction - \$ Damages (60B)

90

People sent messages People responding (not out/stop) People responding out/stop

Message B: Legal Aid gave you advice and papers about representing yourself when your landlord sues you for money. Did you file an answer with the court using these forms? Text Y or N to let us know.

Message C: Legal Aid gave you advice and forms regarding a claim your landlord filed against you for money. Did Legal Aid's advice and forms help you to reduce or avoid the amount owed to your landlord? Text Y or N or NOT YET to let us know.

Message D (ONLY if Msg C = NOT YET): You told us the case with your landlord about money was not yet resolved. Did Legal Aid's advice and forms help you to reduce or avoid the amount owed to your landlord? Text Y or N to let us know.

People Sent Messages

183

Response Rate:

49.2%

We are:

- Angela Tripp, <u>trippa@mplp.org</u>
- Scott Ellis, scoellis@mplp.org
- You'll get a survey from GTW right after this webinar; please take a few moments to fill it out and give us feedback on this project and this training.
- We'll also make the slides available to everyone who registered. Thanks!