

To request answers to questions about this project:

1. Add questions to google doc here:
[Questions for Project 5: Create a guided interview that helps legal services advoca...](#)
2. Text the sponsor of this challenge, Michael F at 215-779-4166 to request a time to schedule a quick zoom call.

Project 5: Create a guided interview that helps legal services advocates complete complicated paperwork in the course of resolving a tangled title dispute

The Center for Legal Services' homeownership unit helps its clients resolve tangled title disputes. A tangled title dispute occurs when the ownership of a house is disputed. Filling out the tangled title forms manually is tedious, repetitive, and time-consuming work. Automating part of this process with a guided interview that generates the final documents will save hundreds of hours a year for advocates. Advocates will be able to spend that saved time on serving more low-income Philadelphians.

About the Non-Profit: Community Legal Services is a non-profit services organization that serves around 10,000 clients every year in a range of legal matters.

Goal: To create a guided interview for advocates that will allow for the collection of information that is needed to fill out various forms for resolving tangled title disputes. At the end of the guided interview, the user can download the forms with the data automatically filled into the correct fields.

More information for participants (answers are from the partner non-profit)

6-minute intro to the project (video):

https://drive.google.com/file/d/10R_jAHRn0oZP0QlgwBjTj0yvsLs3ounA/view

Can you rank the top three goals of the project?

1. Create a guided interview for advocates.
2. The guided interview collects information that we need to fill out various forms for resolving tangled title disputes.
3. And at the end of the guided interview, the user can download the forms with the data filled in.

Who are the top target beneficiaries (users, stakeholders, etc) of the project? What do you hope they gain from the value your project delivers?

Filling out the tangled title forms manually is tedious, repetitive, and time-consuming work. Automating part of this process with a guided interview that generates the final documents will save hundreds of hours a year for advocates. Advocates will be able to spend that saved time on serving more low-income Philadelphians.

Project Scope - Rank, to the best of your ability, what you hope to deliver with the project. At the very least, if you could choose to deliver only one feature, what would it be?

1. A guided interview that asks for information required on several title-related forms, and produces the forms with data filled in.

Are there other dependencies, resources, or partners you anticipate using or needing in order to deliver the project?

We have a preference for using the platform Docassemble because the homeownership unit already uses that platform for other guided interviews. so we are already able to host it, use it and maintain it

Who are the key contacts and stakeholders? What are their roles, involvement expectations, and skill sets?

Michael Froehlich, managing attorney of the homeownership unit, and Dot Goldberger, paralegal and the homeownership unit.

A video note from Michael Froehlich on the importance of this project (2 mins):

https://drive.google.com/file/d/1_IBVJiq2gibkBzkfmOZrX7XT89pu8BCp/view

Additional Info

Creating a probate-o-matic to help resolve tangled titles. The deed-o-matic (see clsphila.org/deedomatic) has worked so successfully, that we'd like to create a companion probate-o-matic. After we open someone's estate to resolve their tangled title, we need to complete four different forms. These forms use the same information. Here is a link to a google document with the 26 common questions we need to ask & a few notes about the formatting for each field:

<https://docs.google.com/spreadsheets/d/1KQlVaSe2gcyCoY-q0qc-aqLh79hGCiHb5FMwrxUyfJ0/edit?usp=sharing>

And here are the four forms that need to be completed with the answers to these questions:

<https://www.pacourts.us/Storage/media/pdfs/20210224/225720-rw10paocrule612statusreport-000827.pdf>

https://www.pacourts.us/assets/opinions/Supreme/out/form_rw-09.pdf

<https://www.pacourts.us/Storage/media/pdfs/20210224/225656-rw07noticeofestateadministrationpursuanttopaocrule105eff090116-005411.pdf>

<https://www.pacourts.us/Storage/media/pdfs/20210224/225705-rw08certificationofnoticeunderpaocrule105eff090116-005412.pdf>

Since we have experience working with docassemble, we would love it if this could also be built in docassemble.

Questions:

Where can I learn more about the community partner?

- <https://clsphila.org/services/housing/>

What circumstances give rise to title disputes?

- A tangled title occurs when someone lives in a house, but is unable to prove ownership because that person's name does not appear on the deed.

How does something like this (title disputes) happen?

- Though it may seem implausible especially for something as important as purchasing real estate, "to err is human." Some of the main causes of tangled title disputes are (a) having legally-approved agent to record on your behalf but for some reason fails to do so; (b) failing to file yourself for whatever reason; and (c) an informal conveyance of property (usually occurs with transactions/transfers of property between family members).

Where can I find information on any rules/regulations/agencies for this project?

- <https://clsphila.org/consumer-rights/resolving-tangled-titles-in-philadelphia/>
- <https://www.phila.gov/documents/tangled-title-information-sheet/>
- <https://philalegal.org/services/tangled-title>
- <https://www.pewtrusts.org/en/research-and-analysis/reports/2021/08/how-tangled-titles-affect-philadelphia>
- <https://why.org/articles/philly-has-over-10000-tangled-titles-heres-what-residents-need-to-know-about-them/>

Are there datasets on tangled titles that we could use to research the problem?

- The 2021 [PEW report](#) consolidates data from four sources - can we update the data for 2022?