WASHINGTON STATE
BAR ASSOCIATION

Washington State Bar Association

REQUEST FOR PROPOSAL (RFP) FOR Washington Legal Link

GENERAL INFORMATION

Date Advertised and Publicly Available:　　September 10, 2020
Proposal Due Date:　　　　　　　　　　October 30, 2020

PROPOSAL CONTACT

Attention:　　　Eric Holman
Email:　　　Erich@wsba.org

About the Washington State Bar Association

The Washington State Bar Association operates under the delegated authority of the Washington Supreme Courtand exercises a governmental function authorized by the Washington Supreme Court to license and regulate the state's nearly 40,000 legal professionals, including lawyers, limited practice officers, and limited license legal technicians. The WSBA both regulates legal professionals under the authority of the Court and serves its members as a professional association — all without public funding. In its regulatory capacity, the WSBA administers the bar admission process, including the bar exam; provides record-keeping and licensing functions; and administers the lawyer discipline system. In its professional service capacity, the WSBA provides continuing legal education for legal professionals, in addition to numerous other educational and member-service activities.

Our Mission

The WSBA's mission is to serve the public and the members of the Bar, to ensure the integrity of the legal profession, and to champion justice.

The WSBA is committed to diversity and inclusion in our organization and throughout the legal profession.

Project Description

The Washington State Bar Association is building and launching an online public resource, "Washington Legal Link," in the hopes of matching legal professionals with the public's needs. Members of the public will be able to input specific criteria—such as location, problem area, and price point—to receive a directory of corresponding legal professionals; and, legal professionals will be able to personalize their profile and experience as a marketing tool. The overall goal is to connect more Washingtonians with accessible legal help.

This should include at least the following Core Capabilities:

- Member profile setup and edit (within myWSBA)
- Consumer search and profile access
- Administrative functions (consumer website)
- Save/Publish workflow
- Admin work queue / Active profile issues
- Admin review process (member correction of profile issues)
- Comment system (between admin and member)
- Custom email/notification system
- Full edit tool
- Updates to Terms and Conditions workflow
- Heat map
- Search results – keyword search on all data, dynamic filtering
- Context sensitive consumer and member FAQs
- Member-specific analytics
- Admin controlled UI labels and hover text

Project Requirements

- *See the attached documentation for full functional requirements*
- Milestones and deadlines – complete within the October 1, 2020 – September 30, 2021 Fiscal year.
- Project assumptions – Member portion will be built and reside in myWSBA.org, which is built on the Personify 7.6.1 platform.
- Project budget – TBD based on RFP responses
- Core technology – .Net framework

Proposal Requirements

All proposals must contain the following information (minimum):

- Solution Proposal
- Project Plan Strategy
- Cost Estimates
- Delivery Timeline
- Assumptions
- Implementation Strategy, including Training
- Post Deployment Support

Proposal Guidelines and Timeline

- Proposals are due to WSBA no later than 5 p.m. PST on September 30, 2020
- If you would like to have a meeting with us to clarify or expand on the project requirements, please submit a completed Request for Information (RFI) with the meeting request. Requests received without the completed RFI form will not be processed.
- All questions prior to submission are to be directed to the project contact using the information provided on the cover page of this RFP.
- Submit proposals via email with the subject line: **RFP submission for Washington Legal Link.**
- You will be notified within 60 days if you are selected for an interview with our evaluation team.
- Selection will occur as soon as practicable.
- All other candidates will be notified after selection of a contractor and successful contract negotiation.
- The goal for implementation no later than September 30, 2020 but final deliverables and launch dates will be negotiated with the chosen vendor.
- All submissions will become Bar Records, *see* Washington General Rule (GR) 12.4, and therefore available to the public upon request to the WSBA, unless exempted from public disclosure by a specific provision of law. If the WSBA receives a request for records related to your submission and believes they must be disclosed, you will be notified prior to release and given an opportunity to object to disclosure under GR 12.4(h) if you would like to do so.
- Submission of a proposal meeting the requirements in this RFP does not create a binding agreement. The WSBA will negotiate a contract with the selected candidate, if any.
- The WSBA reserves the right to reopen the RFP process if it does not identify a suitable candidate or if the WSBA and the selected candidate are unable to agree on contract terms. The WSBA may also decide not to select any candidate as a result of this RFP.

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Request for Information

Contents

1. Document Overview

This is a Request for Information (RFI), not an order. No cost can be charged to WSBA for any reason.

This document shall not be construed as a request or authorization to perform work at WSBA's expense. Any work performed by a vendor will be at the vendor's own discretion and expense. This RFI does not represent a commitment to purchase or lease. Submission of a response constitutes acknowledgement that the vendor has read and agrees to be bound by such terms.

This Request for Information document is to be completed and submitted with any proposal for consideration by WSBA. It is also required to be submitted with any meeting requests prior to submission of a proposal (i.e. meeting to discuss/confirm requirements).

2. Point of Contact

All communication with WSBA must be directed to the single Point of Contact for this project, as follows:

Name, Title	Eric Holman, Application Development Manager
Email	erich@wsba.org

3. Submission of Responses

Responses for information in all sections of this document must be answered as concisely as possible while providing all information necessary to understand the outsourcing process proposed. Any deviations from requirements, or requirements that cannot be satisfied by the vendor, must be clearly identified.

Any information of a confidential or proprietary nature contained in a vendor response should be clearly marked 'PROPRIETARY' or 'CONFIDENTIAL' by item or at the top of each page. Reasonable precautions will be taken to safeguard any part of the response identified by a vendor as being confidential or proprietary.

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NOTE: All submissions will become Bar Records, see Washington General Rule (GR) 12.4, and therefore available to the public upon request to the WSBA, unless exempted from public disclosure by a specific provision of law. If the WSBA receives a request for records related to your submission and believes they must be disclosed, you will be notified prior to release and given an opportunity to object to disclosure under GR 12.4(h) if you would like to do so.

4. Question Section

1) Provide the name, title, address, telephone and e-mail for the primary contact.

Name and Title	
Address	
City, State/Provide, Postal Code	
Phone Number	
Email	

2) Provide some general business background information.

Year Company Was Founded	
Type of Entity (Sole Proprietor, Corporation, etc)	
Total Active Client Base	
Total Number of Employees. Please distinguish between full-time employees on site and contract or other employees to whom you outsource.	
Provide documentation of your commitment to diversity, inclusion and equity, including written equal opportunity and affirmative action policies and a listing of all awards, certifications and accreditations related to diversity and inclusion. Describe how your firm models respect for and inclusion of people who are different.	

3) Provide a high-level description of your capacity to deliver this projects.

Years Providing Customer Support /Consulting	
Number of Customers	

Total Number of Developers on Staff with Appropriate Skill Set for this Project	
Please Indicate any Potential Conflict of Interest in Current Customer Base	
Please describe any work and the entities to which you might outsource work for this project.	

4) Experience

Please Describe Experience Working with Government Agencies	
Please Describe Experience Working with Not-For-Profit Organizations	
Please Describe Other Relevant Experience	

5) Geographic coverage

Location of Headquarters and of Branch Offices	
Total Number of Clients in the US	
Total Number of Clients in Washington (included in above total)	
Total Number of Clients in the Greater Seattle Area (included in above total)	

6) Client references

Reference #1	
Name, Title	
Phone Number	
Email Address	
Description of Engagement	
Reference #2	
Name, Title	
Phone Number	
Email Address	

Description of Engagement	
Reference #3	
Name, Title	
Phone Number	
Email Address	
Description of Engagement	

7) Additional relevant information

Please describe any additional information that would be relevant to this inquiry and/or project:

Washington Legal Link Requirements

The Washington State Bar Association is building and launching an online public resource, "Washington Legal Link," in the hopes of matching legal professionals with the public's needs. Members of the public will be able to input specific criteria—such as location, problem area, and price point—to receive a directory of corresponding legal professionals; and, legal professionals will be able to personalize their profile and experience as a marketing tool. The overall goal is to connect more Washingtonians with accessible legal help.

The Washington Legal Link tool is comprised of three main features: a member area, a consumer site, and administrative functionality for the consumer site. The member area will be developed within our existing member portal, called myWSBA, which is built on the Personify 7.6.1 platform and has built-in member login and authentication. The consumer piece should be built as a separate public website that does not require user login or authentication. The admin piece should be built as a feature of the consumer site, and will require login and authentication for administrative users. The admin functionality only applies to the consumer site. Admin for the member site will be performed within the existing Personify 7.6.1 platform.

Some of the features detailed below have been mocked up in a prototype for additional visual assistance, and can be viewed here: https://xd.adobe.com/view/b97c6189-40c4-49af-78df-537ad7775861-cf4d/.

Please note, this prototype is not complete and should not be used for estimation purposes. Please review all user stories provided below in full detail.

Core Capabilities:

- Member profile setup and edit (within myWSBA)
- Consumer search and profile access
- Administrative functions (consumer website)
- Save/Publish workflow
- Admin work queue / Active profile issues
- Admin review process (member correction of profile issues)
- Comment system (between admin and member)
- Custom email/notification system
- Full edit tool
- Updates to Terms and Conditions workflow
- Heat map
- Search results – keyword search on all data
- Search results – dynamic filtering
- Context sensitive consumer and member FAQs
- Member-specific analytics
- Admin controlled UI labels and hover text

User Stories

Note: All member pages are built within myWSBA as myWSBA pages

LINK-6 – MEMBER

As a member, I want to have access to LINK, so that I can work on my profile

Acceptance criteria:

After an authenticated Active Attorney, LPO, or LLLT logs in to myWSBA, a LINK option displays on their myWSBA profile

LINK-14 – MEMBER

As a member, I want to choose to participate in LINK, so that my LINK profile is published

Acceptance criteria:

When member selects the LINK option from their myWSBA profile, the Participate page displays

- The member only has to accept the Participate page once
- Member can
    - View Marketing Audio/Video
    - Select FAQ option
    - Select Agree to Participate option
        - Yes: Terms and Conditions page is displayed
        - No: member is returned to their myWSBA profile

History log: UserID, Date/Time, New, Explanation = Participate

LINK-13 – MEMBER

As a member, I want to view the Terms and Conditions page, so that I can accept or decline them

Acceptance criteria:

When member selects YES on the Participate page, the Terms and Conditions page displays

- When member has scrolled to the bottom of the content, Accept option is enabled
- Decline option is always enabled
- Decline: member is returned to their myWSBA profile
- Accept: LINK profile page is displayed

History log: UserID, Date/Time, New, Explanation = T&C

LINK-19 – USER (split MEMBER/CONSUMER)

As a member, I want to view FAQs about LINK, so that I can see if there's an answer to my question

Acceptance criteria:

FAQ option displays in footer of every LINK page

When FAQ is selected

- Member specific FAQ that pertains to the page from which the FAQ option was selected is displayed (context and user specific)
- The first member FAQ page is displayed if there is no page specific FAQ for that page
- Left nav expandable/collapsible table of contents
- Member can return to the page they came from

As a consumer, I want to view FAQs about LINK, so that I can see if there's an answer to my question

Acceptance criteria:

FAQ option displays in footer of every LINK page

When FAQ is selected

- Consumer specific FAQ that pertains to the page from which the FAQ option was selected is displayed (context and user specific)
- The first consumer FAQ page is displayed if there is no page specific FAQ for that page
- Left nav expandable/collapsible table of contents
- Member can return to the page they came from

LINK-18 – MEMBER

As a member, I want to create or update my LINK profile, so that it has accurate data

Acceptance criteria:

Member opens Edit mode by:

- Selecting Edit from left nav of Preview mode
- Member new to Link or member who doesn't have all required fields completed will automatically enter Edit mode when they access their Link profile

LINK profile is displayed in edit mode with the following sections: Contact Information, Bio, Practice Information, Services, I Can Help With

Note: no rich text formatting in member fields

myWSBA data option

- Displayed at the top of each section that contains data that could be pulled from myWSBA
- If selected, data fields are populated with myWSBA data

- Those data fields are disabled – hover text " Data changes must occur in myWSBA or deselect data box"
- If deselected
    - Message "Data changes will not impact your myWSBA profile"
    - Data fields remain populated but are now enabled for editing

Left nav options

- See LINK-101
- Link to WA Legal Link site (consumer side)

Fields

1. **Photo** – default to stock LINK-23

    - LINK displays Photo (stock image or uploaded image). Use stock image if not photo is uploaded.
    - Placeholder text "Upload your photo"

2. **Member Name (as it will appear on their LINK profile)**
    - Display First, Middle and Last name fields
        - Allow special characters - hyphen, apostrophe, accents etc.
        - LINK displays First and Last name as Required
    - Placeholder text: First Name, Middle Name, Last Name

3. **Office Location**
    - Disable Office Location if Virtual Office is selected
    - LINK displays Office Location as Required - IF - Virtual Office is not selected
        - Member must have either an Office Location or have selected the Virtual Office option
    - Office Location consists of:
        - Street Address Line 1, 2, 3, and 4 - 150 characters per line, allow special characters, inside labels
            - Placeholder - Street address
        - City - 50 characters, allow hyphens
            - Placeholder - City
        - State - 2 digits, default to WA (drop down based on Personify list based on country)
            - Placeholder - State
        - Zip - 5 alpha/numeric digits (include something for 9 digit zip code)
            - Placeholder - Zip Code
        - Country
            - Not required
            - Default to US (not displayed on the profile preview – see LINK-39)
            - Drop down based on Personify list – show US first, alpha after that
            - Placeholder - Country
4. **Email address**
    - Validate field contains an "@" and "." symbols
    - LINK displays Phone OR Email Address as Required
        - NOTE - member can have both email address and phone number

- Placeholder - Email address

5. **Phone number**
   - System displays data entry field as: (__) ___-___
   - Format to follow the Legal Directory format (input and output)
   - LINK displays Phone OR Email Address as Required
     - NOTE - member can have both email address and phone number
     - Placeholder - Phone Number

6. **Website**
   - Placeholder - Website

7. **Years of Practice**
   - Numeric, 2 digits

8. **Headline**
   - When Member hover overs this field, display this language "A memorable description to attract prospective clients."
   - Alpha/Numeric, 150 characters
9. **Firm/Organization Name**
   - Character limit = 100

10. **Organization Size/Type**
    - Drop down based on license type: if LPO use Org size/Practice area. LLLT = Family Law

11. **Title**
    - Allow Member to enter their job title

12. **About Me**
    - When Member hover overs this field, display this language, "Share what you'd like prospective clients to know about you."
    - Alpha/Numeric, 2,000 characters

13. **Additional Information**
    - When Member hover overs this field, display this language, "This may include professional experience, education, activities; services offered like free parking, available after hours, etc."
    - Alpha/Numeric, 2,000 characters

14. **Fee Information**
    - Check box for each of the fee types maintained by the Admin. The checkbox labels are:
      - Sliding Scale based on Household Income
      - Flat Rate
      - Hourly Rate
      - Contingency Rate
    - Member checks 0 to 4. Fee information is optional.
    - If Member checks Hourly Rate,
      - Allow Member to enter an optional **Fee Range**

- o From and To data entered by Member
- o From must be less than or equal to the To amount
- o Currency up to 4 digits (whole dollar only)

- If Member checks Sliding Scale based on Household Income,
  - o Allow Member to select one from drop down of ranges:
    - Up to $25,000
    - Up to $50,000
    - Up to $75,000
    - Up to $100,000
- If Member doesn't check any Fee type, display warning message

15. **Free Initial Consultation**
- Checkbox

16. **Virtual Consultation**
- Checkbox

17. **TDD**
- Checkbox

18. **Counties Served**
- Required
- Allow Member to select Western Washington counties
- Allow Member to select Eastern Washington counties
- Allow Member to select 1 or more counties
  - o Drop down populated with data maintained by the LINK admin

19. **Languages other than English**
- LINK displays list of languages established by Personify
- Member can select zero or more languages

LINK-29 – MEMBER

As a member, I want to see definitions of profile data, so that I understand what they are

Acceptance criteria:

When a member hovers over a data field, hover over text is displayed (data pulled from table managed by Admin – see LINK-84)

LINK-23 – MEMBER

As a member, I want to upload my photo, so that it displays in my LINK profile

Acceptance criteria:

Photo is defaulted to stock photo

Member can select change/add picture, which allows them to browse to upload a jpg or png image

Member can save or cancel

- Cancel – member is returned to previous page
- Save
    - o If image is not 300 X 300
        - ▪ Image is resized to 300 X 300
        - ▪ Resized photo is displayed in profile page
        - ▪ Member can accept/decline resized photo
            - • Decline – member is returned to profile page; previously saved image is displayed (or default stock if none)
            - • Accept – photo is stored
    - o If image is 300 X 300
        - ▪ Photo is stored

LINK-30 – MEMBER

As a member, I want to establish and maintain the "I Can Help" section of my LINK profile, so that I can specify what types of law I can help a consumer with

Acceptance criteria:

When in Edit mode in the I Can Help With section, a list of current WSBA practice areas / categories displays on the member's LINK profile based on the practice areas available for their member type (Attorney, LPO, LLLT).

When member selects a category

- Questions for that category are displayed
    - o For LPO and LLLT, this list should include only questions they can help with
    - o Questions should have single select and select all options so that member can select which questions they can help with
    - o Only categories with at least one question selected will display on the member's profile "I Can Help" area
    - o Save/Cancel
        - ▪ Cancel: member is returned to previous screen
        - ▪ Save: "I Can Help With" page is displayed with new selections

History log: UserID, Date/Time, New, Explanation = Member updates I Can Help

LINK-39 – USER

As a user, I want to see the detailed member profile, so that I can view their information

Acceptance criteria:

When a consumer selects to view a member's Link profile:

- Published profile is displayed
- If no data is set for a particular field, the field and label do not show
- "I Can Help With" is available

When a member selects to view a member's Link profile:

- If the member is the member that the profile belongs to
  - If the member accessed their profile through the LINK option in myWSBA, the profile is displayed in edit mode
  - If the member accessed their profile through the public facing page and search criteria journey, the published profile is displayed
- If no data is set for a particular field, the field and label do not show
- "I Can Help With" is available

Fields

1. Display Member **photo**

2. System displays concatenated Member **name**
   - First, middle (if there is a middle name), last

3. Office **address or virtual**
   - Same format as legal directory - allow for country
   - LINK displays Office Location if virtual office is not selected
   - Display words "Virtual Office" where office location is displayed

4. **Email** address
   - When user clicks on Member's email address, System opens blank email in default tool
   - Pre-populate To with Member's email address
   - System records count when a Member's email address is clicked (can't track if anything was sent, just that it was clicked)

5. Display Member **phone**
   - For mobile users - when user clicks on phone number, pop up call or cancel message or auto fill the keypad (depending mobile device)

6. Display **License Type**
   - Allow User to hover over License Type
     - System displays definition (maintained by Admin) in hover over
   - Allow for multiple License Types in display

7. Display **License Number** link
   - Allow Consumer to click on License Number
   - System opens new tab and displays specific Member's Legal Directory page

8. Display **Years of Practice**
   - System translates number of years entered by the Member to a range and displays the range
     - 0-5
     - 6-15
     - 16+

9. Display Member **Insurance**
   - If Malpractice = Yes, System displays "Carries Malpractice Insurance"
   - If Malpractice = No, System displays "Does not carry Malpractice Insurance"

10. Display **Website**
    - When user clicks on Website, System opens URL in new tab

11. Allow User to select either Overview or I Can Help With tab
    - System displays tabs to allow User to toggle between the two views
    - Member header information remains persistent on both views
    - Tab in the viewing panel is grayed out when viewing that tab

12. Display **Headline**

13. Display Firm/Organization **Name**

14. Display Organization **Size/Type**

15. Display **Title**

16. Display **About Me**

17. Display **Additional Information**

18. Display **Fee** Information
    - Display only Fee Types that have been selected by the Member
    - Order of Fee Types from top to bottom: sliding scale based on household income, flat rate, hourly rate, contingency rate
    - Beneath the group of checked fee types, include statement: "For more details regarding fee arrangements, contact me."
      - Display above message even if no fee types were selected by the member.

19. Display Free **Initial** Consultation

20. Display **Virtual** Consultation

21. Display **TDD**

22. Display **Counties** Served
    - Allow user to expand option to view all counties served by the Member
    - If Member has selected all the counties, System Displays "Statewide"

23. Display **Languages** other than English

24. Display Report an issue option

LINK-101 – MEMBER

As a member, I want to manage my profile data, so that I have control over what changes are saved and what is published

Acceptance criteria:

Sections: Contact Information, Bio, Practice Information, Services, I Can Help With

Left nav of Preview:

- If member has no Link history or if not all required fields are completed, member goes directly to Edit
- If member has Published profile: Edit, Unpublish
- Member selects Edit from left nav of Preview
    - Left nav: Preview, Publish/Unpublish, Exit
    - Page displays with editable fields
    - Save (disabled), Next, and Cancel options in each section except I Can Help With
        - I Can Help With section has Save, Cancel, and Finish options
        - Save option enabled only after data has been added or changed
        - Save selected
            - Data validation
            - If member is editing initial profile, message "Your profile data is saved but not published" is displayed after Save
            - Section status = Active
        - Next selected
            - If unsaved data changes, message "Do you want to save your changes before leaving this section?"
            - The next section is displayed
        - Cancel selected
            - If unsaved data changes, message "Do you want to save your changes before exiting?"
            - Preview is displayed
    - Visual notation used to indicate the estimated length of time to complete each section
- Preview
- Publish
    - Publish option enabled only after all required fields are populated
    - While disabled, if member hovers over Publish, sections/fields that haven't been populated are displayed
    - Member selects Publish
        - Profile status = Active

- Notification that profile has been published (to personify primary email)
- History log: UserID, Date/Time, New, Explanation = Profile Published
- Member's profile is displayed with banner message "If you have selected to change the MyWSBA data, remember that doesn't change it in MyWSBA, only in LINK. You need to go to MyWSBA to make the changes to your WSBA profile."

- Un-publish
  - Un-publish option enabled only if the member has a published profile
  - Member selects Un-publish
    - Confirmation message displayed, email notification
    - Profile status = Inactive
    - History log: UserId, Date/Time, New, Explanation - Profile un-published

LINK-47 – CONSUMER

As a consumer, I want to gain access to the LINK profile search feature, so that I can search for legal help

Acceptance criteria:

Link option is available from wsba.org

When consumer selects the Link option

- Link consumer landing page displayed
  - What is WA Legal Link?
  - Announcements
  - Explanation of the search process(es)
  - Note for Washington State only. If you need help outside of Washington go to lawhelp.org
  - Card search option (primary search journey)
  - Open search option (secondary)
  - Footer
    - Terms & Conditions
    - FAQs

LINK-95 – CONSUMER

As a consumer, I want to access a member's Link profile from their Legal Directory profile, so that I can see additional information about that member

Acceptance criteria:

From the Legal Directory member profile, the LINK option is displayed if the member has a published LINK profile

- When consumer selects the LINK option
  - LINK profile for that member is opened in a new tab
  - Hover text when hover over LINK option – explanation of what it is

LINK-85 – CONSUMER

As a consumer, I want to find a legal professional in my geographic area, so that they are in close proximity to me

Acceptance criteria:

After consumer selects card search
- Clickable breadcrumb is displayed
- "Click on the category that aligns with your issue."
- Category cards are displayed
  - Consumer can skip Category selection
    - Message "By skipping the Category selection, you will be moved to the Location selection."
  - After consumer selects a category
    - Questions in that category are displayed
    - Consumer can select one question
    - Consumer can go back to the categories page
- Location
  - County
    - Drop down of WA counties
    - Consumer can skip
      - "Skip and display search results"
      - If skip selected, Search results page displayed

LINK-99 – CONSUMER

As a consumer, I want to do a keyword search in the "I Need Help With" section of the site, so I can find the member who can help me

Acceptance criteria:

Consumer enters text into keyword search text box and selects Search

- Matching questions are displayed
- Category for each question is displayed
- Consumer can click on a question
  - Location page displayed with Category/question in breadcrumb

LINK-93 – CONSUMER

As a consumer, I want to enter text as my search criteria on the search results page, so that I can refine my search for legal professionals

Acceptance criteria:

Keyword filter and text options display on Search Results page

- Drop down populated with Filter titles
    - o Consumer can select one filter
    - o Consumer does not have to select a filter
- Keyword text box
    - o Validation will be done on text based on filter selected (Home Zip filter selected, text restricted to alpha numeric and max length)
- Matching
    - o Keyword text is searched against all questions and all member profile text fields
    - o Results include any members with a published profile who have selected any matching questions or that have any matching profile text fields
- Results page: LINK-51

LINK-86 – CONSUMER

As a consumer, I want to start my search with the filters on the results page, so that I can skip the card search workflow

Acceptance criteria:

From the LINK landing page, consumer has an option to select Open Search

After consumer has selected Open Search

- Search Results page is displayed
- Filters LINK-50 – also count of members who have a link profile and instructions on how to use the filter (if necessary)

LINK-53 – CONSUMER

As a consumer, I want to see members matching my search criteria that are within a certain distance from my home zip code

Acceptance criteria:

Consumer selects Distance (Location) filter from search results left nav
- User can input a zip code to base proximity on
- Consumer can select other distance criteria – drop down of ranges: 5, 10, 25, 50 miles
- Consumer can select Zip Code or Issue County
    - o Zip Code selected
        - ▪ Consumer's zip code entered is matched to member's office address zip code
        - ▪ Matching members are displayed in a list to the left of a map indicating location of each member

- County selected
  - Consumer's county entered is matched to member's counties served
  - Matching members are displayed in a list to the left of a map indicating location of each member
  - Members who have the Virtual office option selected will be included based on their counties served
- Consumer can filter physical or virtual office
- Consumer can sort by member last name or distance

LINK-51 – CONSUMER

As a consumer, I want to see the results of the search criteria I've entered, so that I can select a member

Acceptance criteria:

Results include
- Photo, member name, address/virtual, headline, and license type
- If county entered by consumer, display distance from center of member's home county (ex: 3.3 miles away)
- Search results are displayed in random order
  - Exact matches listed first (randomized separately)
  - Near matches listed below exact matches (randomized separately)
- Search results filter LINK-50
- Keyword search LINK-93
- Map LINK-53
- If no matches found, or if consumer skipped both categories and county, display Open Search

LINK-50 – CONSUMER

As a consumer, I want to filter the search results, so that I can quickly find matches that are most applicable to my situation

Acceptance criteria:
Criteria selected in the filter is displayed as links in the top left of the page of results. If a consumer selects a specific criteria link, that criteria is removed and search results are updated.

Left nav:
- Filter title
  - If consumer went through the card search, county, category, and question selected display as the first filters
  - If any members match filter title, title is emphasized (bold), filter can be expanded/collapsed
  - Filter details displayed under filter title for any details with member matches
    - Filter detail displays with count of members in parentheses after the detail
- I Need Help With categories

- o Category title displayed (collapsed) – font size in between filter title and filter detail font sizes
    - ▪ Consumer can expand one or more categories to show list of first three questions in that category
    - ▪ + after third question will display all questions in that category
    - ▪ Consumer can select one or more questions
- Consumer can select one or more detail values
- Only members with exact match are displayed in results list
- Consumer can remove all filters from the search results page so that the results return to the original search criteria entered through the card search
- Left nav top level filters:
    - o I Need Help With
        - ▪ Categories / questions
    - o Location
        - ▪ Within distance: 5, 10, 25, 50
        - ▪ Issue county (drop down – consumer can only select one)
    - o Practice Information
        - ▪ License Type (drop down – consumer can only select one)
            - ▪ Lawyer, Limited License Legal Technician, Limited Practice Officer
        - ▪ Carries Malpractice Insurance – checkbox
        - ▪ Organization Size/Type – drop down: LINK-18
    - o Fee type information
        - ▪ Sliding Scale – checkbox
        - ▪ Hourly – checkbox
        - ▪ Flat fee – checkbox
        - ▪ Contingency – checkbox
    - o Miscellaneous
        - ▪ Languages other than English – consumer can select multiple from dropdown
        - ▪ Free Initial Consultation – checkbox
        - ▪ Virtual Consultation – checkbox
        - ▪ TDD – checkbox

LINK-38 – ADMIN

As a member, I want to be notified when updates or changes are made to LINK, so that I am aware of them

Acceptance criteria:
Notifications sent:

- Number of visitors to member's profile within certain timeframe
- Number of times member showed up in searches within certain timeframe
- Updates to announcements
- myWSBA updates for larger changes

<u>LINK-84 – ADMIN</u>

As an Admin, I want to create/edit hover over language, labels, and other language delivered to the members and consumers so that the messages are clear and correct

Acceptance criteria:

Maintain Content option:
- Admin can select existing content to be edited
    - Admin selects one piece of content
    - Selected content is displayed in full-edit tool with Save/Cancel options
- Admin can create new content
    - A list of site pages is displayed
    - Admin selects which page the new content will be placed
    - Full-edit tool displays with Save/Cancel options

History log: UserId, Date/Time, New, Explanation - Admin updated

<u>LINK-87 – ADMIN</u>

As an Admin, I want to edit, delete, and create new categories and questions

Acceptance criteria:

Maintain Categories and Questions option:
- Categories
    - Inactive categories differentiated from active categories
    - Admin can mark category as Active/Inactive
    - Admin can create a new category
    - Admin can edit the help text / label of an existing category
- Questions
    - Questions are grouped by category
    - Inactive questions differentiated from active questions
    - Admin can mark question as Active/Inactive
    - Admin can create a new question
    - Admin can edit the help text / label of an existing question
    - Admin can identify and change the category of a question
    - Admin can place a question in multiple categories
- Admin can preview changes to the category/question screens
- Save/Cancel

History log: UserId, Date/Time, New, Explanation - Category/Question Changes

LINK-55 – ADMIN

As an Admin, I want to view the history log for a specific member, so that I can see the changes they've made

View History Log option from member's profile
- All history log records are displayed by date descending
- Last name, first initial displayed for user associated with UserId in history record
- Admin can sort by user, date, new, explanation
- Admin can return to original sort order
- Admin can return to member's profile

LINK-82 – ADMIN

As an Admin, I want to update/change the posted Terms and Conditions, so that I can integrate changes

Acceptance criteria:

Admin selects Maintain Terms and Conditions option
- Admin can download copy of current T&C document
- Admin can make changes and save updated T&C
    o Changes are highlighted for easy recognition by member
- Admin can select publish criteria:
    o Effective date and Termination date
    o Notification to members with a published profile that the T&C have changed
    o Members will need to review and accept the new changes when they log in to their Link profile
    o If updated T&C haven't been accepted by 6 months after the effective date
        ▪ Member's profile status is changed to Inactive (unpublished)
        ▪ Notification to member that their Link profile has been unpublished
        ▪ History Log: UserId, Date/Time, New, Explanation - Profile changed to unpublished due to outdated T&C acceptance

LINK-75 – ADMIN

As an Admin, I want to see data on search results, so that I can identify where membership is low

Acceptance criteria:

When an Admin views a member's Link profile
- Data related to profile fields and their usage is available
- Admin can sort/filter data based on search criteria elements

LINK-83 – ADMIN

As an Admin, I want to manually unpublish a member's profile, so that I can prevent consumers from seeing content that violates the T&C

Acceptance criteria:

Admin selects Unpublish option from a member's Link profile
- Admin can enter reason
- Member's profile status is changed to Inactive (unpublished)
- History log: UserId, Date/Time, New, Explanation - Admin unpublished profile - [reason]
- Notification to member that their Link profile has been unpublished
  - Admin can edit notification prior to being sent
- Member's view of their profile displays an indication that their profile has been set to Inactive until it has been reactivated by an Admin

The member can then make changes to their profile to correct the issue noted by the Admin.
After member marks their profile as Published
- Profile does not automatically change status to Active (published)
- This process occurs first
  - Notification to Admin that an Admin-unpublished profile has been republished by the member
  - Admin can then manually set the member's profile back to Active
  - Or, Admin can add an additional comment, which will send a notification back to the member that more changes are needed before the Admin will publish their profile.

LINK-96 – ADMIN

As an Admin, I want to keep track of data that has been reported as "bad", so that I can ensure the member corrects the data and republishes their profile

Acceptance criteria:

Admin can view a list of open profile issues
- Includes member name (last, first), Issue category, Issue data, Issue date, Profile publish date, Last notification date

Admin can select one or more profile issues to send a notification to the member
- Admin selects Email option
- Admin can customize and send the email
  - Last notification date set to email sent date

LINK-81 – MEMBER

As a member, I want to suggest a question to be added to the list of "I Need Help With" questions, so that I can add a question that addresses my area of expertise

Acceptance criteria:

Member selects Question Request option from their profile page in Edit mode

Member can request a new question
- Drop down with all question categories
- Question text box
- Note text box
- Member can select one category
- Member can enter the text of the question to be added
- Member can enter an optional note
- Submit/Cancel
    - If submit, a notification is sent to an Admin
    - Member can customize the notification before it is sent

Member can provide feedback on questions and/or categories
- Drop down with all question categories
- Drop down with questions
- Note text box
- Member can select one category and zero or more questions in that category
- Member enters a required note
- Submit/Cancel
    - If submit, a notification is sent to an Admin
    - Member can customize the notification before it is sent

LINK-73 – CONSUMER

As a consumer, I want to report an issue with content on a profile, so that it can be reviewed

Acceptance criteria:

Consumer selects "Report an issue with this profile" option from the member's Link profile
- Popup appears with top level list of report categories
    - Option to click on a link that takes a user to a splash page with links to webmaster, grievance, etc.
    - Consumer selects category that best represents the issue they want to report
    - Submit/Back
        - Consumer can only submit one issue report at a time
        - Consumer selects Submit
            - Issue detail is added to the Admin work queue
            - Message "Thank you for your feedback" is displayed
- Alternatively, there is also an option for a consumer to send a custom email to an Admin with issue details about a profile that might not be encompassed in the "Report an issue" workflow