



Self-Help Tracking and Reporting Survey (STARS)

SELF HELP/AB1058 DATA COLLECTION
HANDBOOK 2019

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JUDICIAL COUNCIL
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CENTER FOR FAMILIES, CHILDREN & THE COURTS

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Section 1: Introduction

The Self-Help Tracking and Reporting Survey (STARS) is an online platform that allows staff in family law facilitator and self-help center (FLF/SHC) offices to enter basic information about their customers and the services they provided. This program replaces the Family Law Facilitator Electronic Database (FLFED). It also allows courts to review reports on services they provided and make decisions on how to allocate resources to best serve their customers. The information collected will be used to report statewide statistics to the Department of Child Support Services, to make reports to the Legislature on self-help services, and to inform judicial branch policy and budget decision-making.

STARS survey questions were drafted by JCC staff with extensive input from family law facilitator and self-help service providers.

STARS uses the Qualtrics Survey Data platform, which is licensed to the Judicial Council and is provided without cost to the courts to implement the new reporting system. STARS data collection forms are available through unique internet links sent to each court by the Judicial Council. Confidential data is not collected through this system. STARS is intended to capture the number of incidents of service. It is not intended to capture the amount of time each incident of service takes. Time metrics and workload data are collected through time sheets and Resource Assessment Study (RAS) data collections. RAS is a periodic data collection effort by the Judicial Council's Office of Court Research.

STARS is compatible with PC, mobile devices, including tablets, phones, and devices that use browser-based operating systems, such as Android, Windows 10 and Apple OS. No other software installation is required to use this platform.

Section 2: STARS Overview

This section provides basic information about data entry forms, accessing STARS, and modification of records.

Reporting Customer Encounters

The goal of STARS is to capture every customer encounter handled by the FLF/SHC, including those that are less than 5 minutes. This may differ from FLFED that did not capture all self-help services. Courts that discover that one or more divisions of self-help are not reporting STARS data, should email stars.support@jud.ca.gov to establish links for reporting purposes so that those services will be counted in all reports.

Data Entry Forms

While STARS is designed to be an online reporting system to make it as fast as possible to enter data, optional paper forms¹ are also available to assist courts in collecting data. Each reporting form is linked and described below.

- [Customer Information Form](#): Captures each customer encounter lasting longer than 5 minutes provided by the facilitator and/or self-help office.
- [Daily Statistics and Workshops \(Daily Report\)](#): Captures aggregate data each day for services that are brief (5 minutes or less) and aggregate self-help workshop information.
- [Monthly Statistics and Workshops \(Monthly Report\)](#): Identical to the Daily Report but captures monthly rather than daily data.

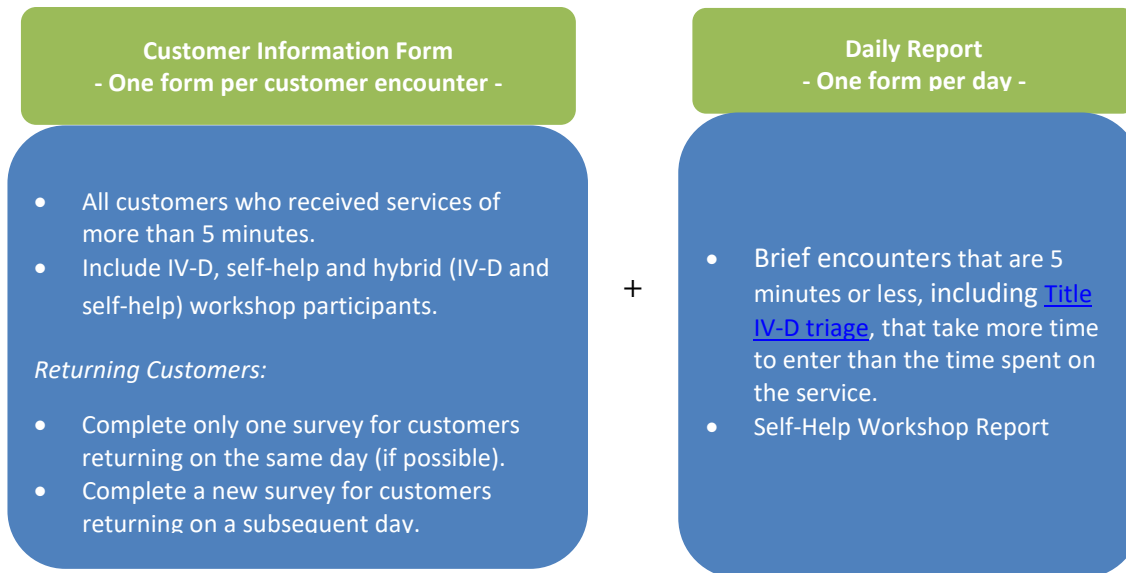
Courts can collect their data in one of two ways.

1. The Customer Information Form and the Daily Report OR
2. The Customer Information Form and the Monthly Report

The preferred practice is to report using Option 1. Use the Monthly Report only in the unusual event that you were unable to enter your services on a daily basis.

The graphic below provides a high-level overview of how encounters should be reported. Sections 3 and 4 provide additional detailed information.

¹ These forms are not collected by the Judicial Council. They should be retained or discarded based on local court records management practices.



Entering Data Into STARS

- Customer and services information that is captured on paper forms needs to be entered in the corresponding STARS survey.
- Ideally, data entry happens throughout the day or at the end of the day that the service was provided.
- Courts can enter data directly into the STARS surveys, bypassing the paper forms. It's also possible to use a mixed model of some direct entry and some paper entry to be entered later, depending on the type of service or staffing. Courts should choose the data collection method that works best for their center.
- Each court location with a self-help center/family law facilitators office was provided with links to enter data into the STARS surveys in Fall 2018. The links auto-populate the County (Location) field in the STARS surveys so it is important to not change them during data entry.

Self-help managers/family law facilitators requiring STARS links for their court or that need to establish a link for a new self-help center should email program staff at stars.support@jud.ca.gov

Viewing Submitted Data

Courts can view summaries of their Customer Information data for each day, a seven day period, and for the month by using dedicated links that were provided in early 2019. Each report is described below:

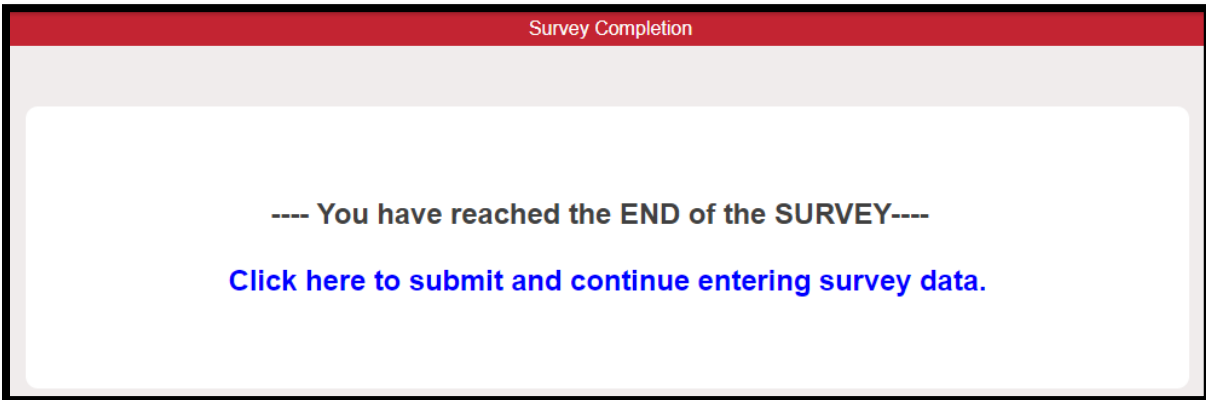
- One day – this report provides a snapshot of the records entered on the day the report is run. If it's run at the end of the day, it will

Self-help managers/family law facilitators requiring links to view their data should email program staff at stars.support@jud.ca.gov

show all of the records entered that day. If it's run earlier in the day, it will show records entered up until the time the report is run.

- Seven-day – This report covers the last seven day period from the date the report was run.
- Monthly report – This report includes records entered for the current month.

Finishing Data Entry



The STARS survey ends at Q11 for customers receiving family law facilitator services and at Q15 for customers receiving self-help services or both family law facilitator and self-help services. After the final question, users will see the screen above. STARS will automatically open another survey, which can simply be closed if the user is done entering records.

Entering Reports from Past Dates

Courts should enter any Customer Information and Daily Reports (or Monthly) that were missed or not entered due to lack of time from past dates.

Modifying Data

For data modification needs, please contact program staff at stars.support@jud.ca.gov.

Section 3: Customer Information Form

General Information

- The Customer Information Form is used to report most FLF/SHC activity. It captures basic information about each customer and the services provided. Include IV-D, self-help and hybrid (IV-D and self-help) workshop participants.
- IV-D services are services provided to a customer whose issues involve parentage, child support order establishment, modification, enforcement and/or health insurance with a case opened with a local child support agency (LCSA) and is currently receiving services.

If the customer does **not** have an open LCSA case, assistance with completing an application for IV-D services and assistance completing the FL-191 also qualify as IV-D services.

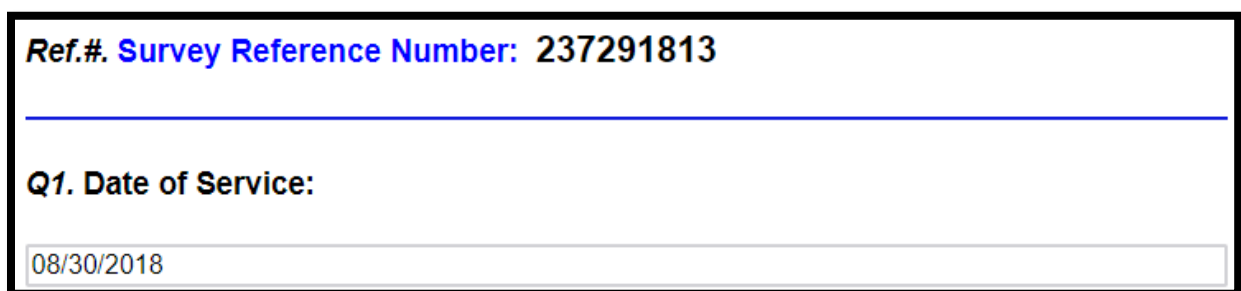
Talk to your local child support agency about when they consider the case open after the application for services is submitted.

- Report each encounter that is more than five minutes whether the service is onsite or remote.
- For returning customers, complete only one survey for customers returning on the same day (if possible). Complete a new survey for customers returning on a subsequent day.
- Consult the [Customer Information Quick Guide](#) for a one-page overview of this form.

Instructions

This section uses screen shots from the STARS Customer Information Survey to provide instructions for each. While the layout is somewhat different between the online survey and the paper form, the same instructions apply to both.

Q1. Date of Service:



Ref.#. Survey Reference Number: 237291813

Q1. Date of Service:

08/30/2018

Date of service refers to date the customer receives FLF/SHC services. It is auto-populated with the date that the information is entered into the system.

If that is not the day that the service was provided, you can overwrite the defaulted date. To do so, type the month, day and year using numeric values (MM/DD/YYYY), for example: 09/10/2019.

Q2. County: (Service Location)

Q2. County:

San Francisco

This field is auto-populated with the location embedded in the dedicated link. If there are multiple FLF/SHC service locations, please check with your program manager or administrator to ensure you are using the correct dedicated link to the Customer Information Report.

Please do not change the county/location. If the correct link is used, it will default to your county/job site; if your county/job site does not appear, then please follow up with your program manager or administrator to get the correct link.

Q3. Has the customer visited this self-help center before?

Q3. Has the customer visited this self-help center before?

Yes

No

Customer Doesn't Know

The intent of the question is to collect data on the number of customers who have visited this particular FLF/SHC before - whether that was earlier in the day or at any time in the past. This question helps distinguish between first-time customers to this center and those who have visited before on any issue or legal matter.

Q4. Language customer feels most comfortable speaking

Q4. Language customer feels most comfortable speaking
(If not listed, select "Other")

English	Armenian
Spanish	Persian/Farsi
Chinese/Cantonese	Cambodian
Chinese/Mandarin	Hmong
Filipino/Tagalog	Russian
Vietnamese	Arabic
Korean	Other

Please ask this question to all customers regardless of the language spoken at point of contact and verify the customer's response if they completed a paper intake. This question will help identify the need for language assistance. This question is intended to capture the language the customer feels most comfortable speaking. Often this is the language that the customer speaks at home, but some litigants feel more comfortable conducting legal business in English or another language.

Important: Q4 does not collect data on the language in which the service is being provided. Q9 asks whether the center provided services in a language other than English.

Q5. Customer's Zip Code

The screenshot shows a survey interface. On the left, a dropdown menu lists various languages: Albanian, Amharic, Bantu, Bengali, Bielorussian, Bisayan, Bulgarian, Burmese, Chamorro, Croatian (highlighted in blue), Cushite, Czech, Danish, Dutch, and Fijian. Below the list is an empty input field with a red border. To the right, there are two buttons: 'Arabic' and 'Other' (highlighted in red). Below these buttons is a text input field with the label 'feels most comfortable speaking'. At the bottom, there is a text input field with the label 'Q4.1b. If language is not listed above, enter language name here'.

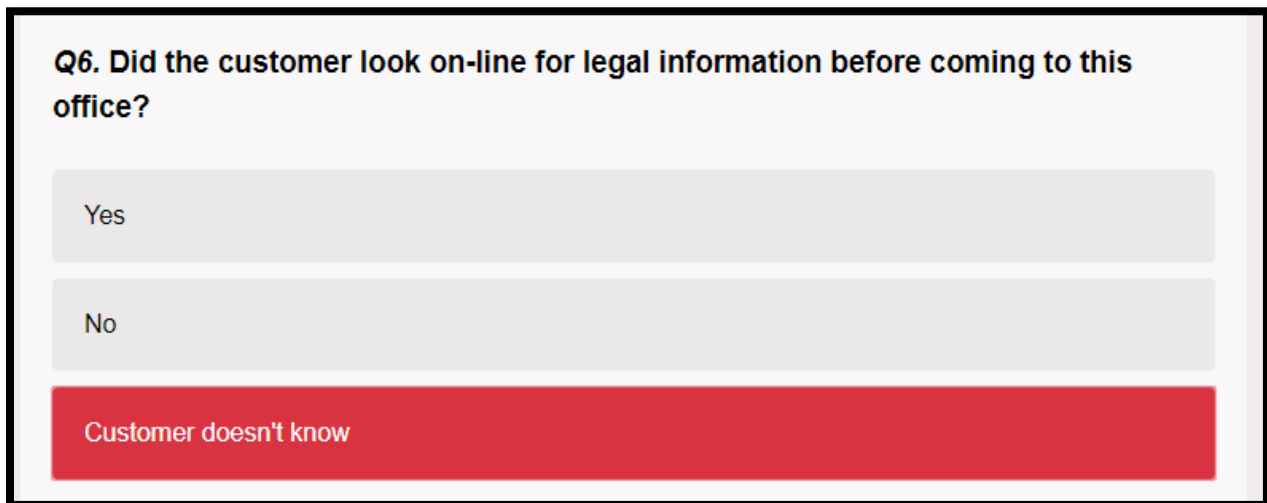
The screenshot shows the 'Q5. Customer's Zip Code' form. It has a red header bar with the text 'Zip code'. Below the header is a text input field containing the value '94102'. There are two radio button options: 'Customer **does not have** a zip code' and 'Customer **did not provide** a zip code'.

Enter the customer's home or P.O. Box zip code in the zip code field. (If the customer has a home and P.O. Box zip code, use the home zip code.) The purpose of this question is to identify the demographic of the people served by the FLF/SHC. Zip codes act as a proxy for other demographic information when coupled with census data. It also helps identify areas where you might want to do outreach in the future, and will help build a visual picture of services throughout the state.

- Select “Customer **does not have** a zip code” if the customer does not have a zip code. That would primarily be for persons who are homeless.
- Select “Customer **did not provide** a zip code” if customer does not know or want to provide zip code.

Practice Tip: If the customer provides a zip code in their court documents, check with them to make sure that this is their home address before assuming that you can use that zip code.

Q6. Did the customer look online for legal information before coming to this office?



The image shows a screenshot of a survey question. The question is "Q6. Did the customer look on-line for legal information before coming to this office?". Below the question are three radio button options: "Yes", "No", and "Customer doesn't know". The "Customer doesn't know" option is highlighted in red.

This question asks if the customer, prior to visiting the self-help center, visited any websites looking for legal information information. Website examples include, but are not limited to:

- ✓ California Courts’ Self Help site
- ✓ Court website
- ✓ Nolo
- ✓ Legal Zoom
- ✓ Reddit
- ✓ Avvo

Q7. How service is provided (Select all that apply)

Q7. How service is provided: (Select all that apply)

<input checked="" type="checkbox"/> In-person (<i>One-on-one services or workshop</i>)	<input type="checkbox"/> CoBrowsing (<i>remote asst. browsing</i>)
<input type="checkbox"/> Telephone	<input type="checkbox"/> Mail (<i>Correspondence</i>)
<input type="checkbox"/> Text message	<input type="checkbox"/> Video Conference (<i>i.e., Skype, Zoom, etc.</i>)
<input type="checkbox"/> E-mail	<input type="checkbox"/> Other: <input type="text"/>
<input type="checkbox"/> Live Chat	

This question asks how the service is provided to the customer by self-help or facilitator staff.

- **In-Person:** Select this option if you provide a one-on-one or workshop in-person service, whether that service is onsite at the FLF/SHC or at another location. Include all workshop participants, whether the workshop is self-help or IV-D. In Question 9, select “workshop” to describe the service provided.
- **Telephone:** Select this option if you provide services to a customer by phone. Do not include checking voicemail but do include returning phone calls.
- **Text message:** Select this option if you provide services to a customer by text messaging.
- **E-mail:** Select this option if you provide services via e-mail to a customer. Do not include emails to schedule appointments or to send documents, which can be reported on the Daily Report (or Monthly), Item 2 – Brief Information and Referral.
- **Live Chat:** Select this option if you provide real-time web-based live chat services to a customer.
- **CoBrowsing:** Select this option if you provide services by CoBrowsing (short for collaborative browsing), where services are provided by joint navigation through the internet by two or more people accessing the same web page at the same time. This is primarily used with a dedicated computer at an off-site location.
- **Mail:** Select this option if you provide self-help or facilitator services via US or other mail service to a customer. Include correspondence with incarcerated individuals in this category.
- **Video Conference:** Select this option for each customer who is provided with services via video conference, which is a live, visual connection between two or more people in separate locations.

Practice Tip: If it takes more than 5 minutes to pull the information, assess the type of service needed, pull court records, and provide the service, the interaction should be documented using the Customer Information Form. If it takes 5 minutes or less to do these same activities, use the Daily or Monthly Report.

Q8. IV-D triage conducted

Q8. IV-D triage conducted

Yes

No

Don't Know

- Title IV-D triage is a specific type of brief encounter.
- It includes family law facilitator services such as providing basic information on court processes, distribution of court forms, and making a referral or screening the customer to determine eligibility for services and type of services needed.
- Report as follows:
 - IV-D triage only: Daily or Monthly Report
 - IV-D triage plus a one-on-one self-help or IV-D service: Customer Information
- Do not report: The needs assessment phase of a one-on-one service. Triage is considered part of the one-on-one service.

SERVICE SCENARIO: *Customer does **NOT** have an open case with the local child support agency. Customer comes to FLF/SHC front desk to ask questions about the divorce process. Two interactions take place. The first interaction takes 3-5 minutes. The customer is asked to wait until a subject matter expert is available to help. The customer waits another 5 minutes for assistance. Subsequently, a FLF/SHC staff person is able to help the customer. Does the first interaction count as **IV-D triage**?*

ANSWER: The service can be counted as IV-D triage as well as a full non-IV-D type service. The customer does not need have an open child support case with the local child support agency for the initial interaction to be considered IV-D triage (if it is 5 minutes or less).

Q9. Services provided (Select all that apply)

Q9. Services provided: *(Select all that apply)*

Forms and/or Documents	Order After Hearing or Judgment
Information provided <i>(Legal and/or Procedural)</i>	Services provided in a Language Other than English
Courtroom Services	Workshop
Settlement Assistance/Mediation	Other:

This question captures information about the type of service provided. Staff should select all that apply

- **Forms and/or Documents:** Report assistance with completing or reviewing case pleadings or other paperwork using form-preparation software, helping a customer complete a document assembly interview to generate forms, making copies, and helping a customer with e-filing.
- **Information provided (Legal and/or Procedural):** Report assistance with basic information on court processes, making a referral to another department or agency, and screening the customer to determine eligibility for services and type of service needed.
- **Courtroom Services:** Report courtroom services including assisting bench officers in the courtroom by answering litigant questions, explaining forms and documents, and explaining outcomes or making referrals. It can be difficult to collect customer data in the courtroom setting. Use the Daily Report (or Monthly) for any courtroom customers not reported on the Customer Information Form.
- **Order After Hearing or Judgment:** Report assistance preparing Order After Hearing or Judgment forms such as a Finding and Order After Hearing, Stipulation and Order, Restraining Order After Hearing, Judgment (default or stipulated), etc.
- **Settlement Assistance/Mediation:** Report each customer provided with settlement assistance to reach an agreement in a case or with mediation.
- **Services provided in a language other than English:** Report when the FLF/SHC assisted the limited English proficiency (LEP) customer in a language other than English. Assistance may be provided by an interpreter, bilingual staff or volunteers, LanguageLine or similar service.
- **Workshop:** Report each customer who attended a workshop. A workshop means that assistance is provided in a group setting that includes a group presentation.
 - ✓ Workshops may include a component of individualized services such as individually

- reviewing participants' forms for completeness.
- ✓ Do not include short presentations (less than 15 minutes) on general information about the availability and/or logistics of services followed by individualized assistance with forms and/or analysis of the legal issues facing a customer.

Q9.1 Forms/Documents Services provided: (Select all that apply)

Q9.1. SHC Forms/Documents: *(Select all that apply)*

Review Forms	Make Copies/Organize Documents/Mailings
Provide Forms and/or Info Packets	Help with Document Assembly <i>(HotDocs, Guide and File)</i>
Help with Completing Forms	Help with E-filing

Q10. Service(s) customer receives

Q10. Service(s) customer received

IV-D Services Only
Non IV-D Services Only
IV-D and Non IV-D Services

- **IV-D Services Only** *(Facilitator Services)*: Report services provided to a customer whose issues involve parentage, child support order establishment, modification, enforcement and/or health insurance with a case opened with a local child support agency (LCSA) and is currently receiving services.

If the customer does **not** have an open LCSA case, assistance with completing an application for IV-D services and assistance completing the FL-191 also qualify as IV-D services.

Practice Tip: Talk to your local child support agency about when they consider the case open after the application for services is submitted.

- **Non IV-D Services Only (Self-Help Services):** Report customers who receive any other type of service that is provided by the FLF/SHC that is not defined as IV-D eligible.
- **IV-D and Non IV-D Services (Facilitator and Self-Help Services):** Report customers who receive services for both IV-D eligible and non IV-D type services.

Q11. IV-D Services Provided (Select all that apply*)

Identify the type of IV-D issues in which assistance was provided.

Q11.1.
***IV-D Services provided:** *(select all that apply)*

Modify Child Support	License Revocation
Support Arrears	Spousal Support
Establish Child Support	Paternity
Preparation of Order	Set Aside
Medical Support	Other Title IV-D service
	<input type="text"/>
Answer	

***Note:** Please select the best answer, however in some circumstances more than one selection may be appropriate. For example, if you assisted parties with mediating their child support order and then prepared a stipulation and order, you would select “Other Title IV-D Service” and type “mediation” and would also select “Preparation of Order.” On the other hand, for pleadings in support of a motion to modify child support, such as an Income and Expense Declaration and Proof of Service, you would only select “Modify Child Support.” Finally, the examples listed for each selection below are for illustration purposes and are not an exhaustive list of types of service provided.

- **Modify Child Support:** Assistance with a motion or responsive declaration to modify child support.
- **Support Arrears:** Assistance with a motion or responsive declaration regarding support arrears, including child support, spousal support, medical expenses, and childcare expenses.

- **Establish Child Support:** Assistance with a motion or responsive declaration to establish an initial child support order or an order when child support was reserved.
- **Preparation of Order:** Preparation of court orders such as a Finding and Order After Hearing, Stipulation and Order, Judgment (default or stipulated), etc.
- **Medical Support:** Assistance with pleadings regarding medical support not related to support arrears.
- **Answer:** Assistance with preparing an Answer to a Summons and Complaint or UIFSA petition for support.
- **License Revocation:** Assistance with motion regarding judicial review of license denial.
- **Spousal Support:** Assistance with a motion or responsive declaration to modify spousal support when there is also a child support order being enforced by the local child support agency.
- **Parentage:** Assistance regarding establishing or contesting parentage, such as a motion for genetic testing.
- **Set Aside:** Assistance with *any* motion to set aside a judgment, including a voluntary declaration of parentage or paternity.
- **Other Title IV-D Service:** Other types of assistance such as, completing a Child Support Case Registry Form, helping with an application to a local child support agency, calculating guideline child support, mediation, or other types of motions not listed above. (**Note:** if you select this option, you will need to fill-in the field with the type of assistance given.)

Q12. Family Law Service(s) provided: (Select all that apply)

Q12. Family Law Service(s) provided: *(Select all that apply)*

Adoption	Domestic Violence-Respondent
Child Support <i>(Non IV-D Services)</i>	Parentage <i>(Non IV-D Paternity)</i>
Child Custody and/or Visitation	Spousal or Partner Support
Divorce	Other Family Law:
	<input type="text"/>
Domestic Violence-Petitioner	

Select the family law services provided to customer.

Q13. Civil Service(s) provided: (Select all that apply)

Q13. Civil Service(s) provided: (Select all that apply)

Civil Harassment - Petitioner	Civil Harassment - Respondent
Landlord/Tenant - Landlord	Landlord/Tenant - Tenant
Small Claims – Plaintiff	Small Claims - Defendant
Consumer Debt	Elder Abuse
Name Change	Other Limited Civil
General Civil	Other:

Select the civil law services provided to customer.

- **General Civil:** refers to assistance with unlimited civil cases involving more than \$25,000.
- **Other Limited Civil:** refers to assistance with civil cases where the amount requested is less than \$25,000 and the action is not filed in small claims court. Landlord/tenant matters, and consumer debt cases are often filed as Limited Civil Cases and should be recorded in their specific subject matter box.
- All other civil cases where the amount at issue is less than \$25,000 and not filed in small claims court should be identified as Other Limited Civil.

Q14. Probate Services provided: (Select all that apply)

Q14. Probate Service(s) provided: *(Select all that apply)*

<input checked="" type="checkbox"/> Guardianship – Petitioner	<input type="checkbox"/> Limited Conservatorship
<input type="checkbox"/> Guardianship – Objector	<input type="checkbox"/> Probate
<input type="checkbox"/> Conservatorship	<input type="checkbox"/> Other: <input type="text"/>

Select the probate services provided to customer.

Q15. Expungements/Traffic Service(s) provided: (Select all that apply)

Q15.
Expungements/Traffic: Other Miscellaneous non IV-D Services provided *(Select all that apply)*

<input checked="" type="checkbox"/> Expungements	<input type="checkbox"/> Other: <input type="text"/>
<input type="checkbox"/> Traffic	

Select the type of services provided to customer.

Section 4: Daily/Monthly Statistics and Workshops Report

General Information:

- The Daily Statistics and Workshops Report (Daily) is completed each day to collect aggregate counts of brief encounters. Brief encounters are services that are 5 minutes or less, including Title IV-D triage, that take more time to enter than the time spent on the service.
- The Monthly Report captures the same information but is completed only once per month.
- The Daily is preferred to ensure that the STARS database is as current as possible.
- Courts can choose to use the Daily Report in some locations and the Monthly in others; however, within one location, please use either the Daily or Monthly Report and not both.
- Please do not duplicate counts of customers that were reported on the Customer Information Form.

Instructions

Q2. – Today's Date

Enter the date that the services were provided. Please use the following format: MM/DD/YYYY.

Q2. – # of Phone Calls

- Report the total number of customers assisted with services such as contact information for another agency.
- This should not include telephone calls for merely giving out directions to the office or changing an appointment time.
- If the phone call is longer than 5 minutes, please complete the Customer Information Form for the interaction.

Q2. – # of Brief Information and Referrals

- Report the total number of customers assisted by providing written informational materials, contact information for other agencies or resources, or other services.

Q2. – # of Customers Served in Courtroom

Report the total number of customers who were assisted in a courtroom.

Q2. – # of Workshop Attendees Not Included in the Customer Information Survey

Workshop participants should be reported on the Customer Information Form and in the Workshop section of the Daily or Monthly Report. However, report in this field, the number of workshop participants that could not be captured on the Customer Information Form due to time constraints.

Q2. – # of Customers not Recorded

Report the total number of customers that received services lasting more than 5 minutes but due to time constraints were not recorded on the Customer Information Form. Self-Help Centers and Facilitators offices are busy places and sometimes you won't be able to capture the information for every person you serve every day. To make sure that we can report on actual number of persons served, it is important that we at least have a record of those additional people served.

Q3. – Family Law Workshops and Q4. – Non Family Law Workshops

These sections capture important information about FLF/SHC workshop activity. Please report all workshops regardless of whether they are held offsite. The information in this section is in addition to reporting workshop participants on the Customer Information Form (preferred) or in Item 2 of The Daily Report because there was insufficient time to complete the Customer Information Form. The information is not being double-counted since data reported in Q3 and Q4 is to track resources allocated to workshops and their usage, not to gather customer encounter data.

of Workshops

Please report the number of workshops held each day (or month) for each of the case types. Report the workshop even if only one person participated.

Total Time (Minutes)

- Report the total amount of time scheduled for workshops. For example, if there were two 60 minute divorce workshops held in one day, report 120 minutes.
- Enter only the number of minutes. Please do not enter "hours" or "minutes" in the field.
- For courts using the Monthly Report, please add the time scheduled for workshops and report as the total number of minutes for the month.

Total # of Attendees

- Report the total number of attendees for the day (or month) participating in each type of workshop.

Practice Tip: The FLF/SHC may decide to designate one person to keep track of all workshops and number of participants or the workshop facilitator may track the information.