

VA



U.S. Department
of Veterans Affairs

CMS Account Admin Discovery

Research Readout

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Background & Goals

What is CMS account admin?

- Granting **new account** or **permissions change** requests
 - Verifying user's permissions with someone associated with their VA product
 - Verifying additional requirements, such as training
 - Creating new accounts or updating permissions in the CMS
- Facilitating **onboarding and training requirements**
 - Managing training rosters
 - Managing access to training demo environment
- **Offboarding accounts**
 - Understanding when to offboard/deactivate a CMS account

Background

- Intent to **redesign our currently ad hoc processes** into a complete service for account requests
- **Lack of OCTODE and VA-side business processes** is our biggest blocker to improving at the moment.

[Read the full research plan](#)

Research goals

For each CMS-supported product:

- Understand the **current experience**:
 - How do our VA stakeholders understand the value of CMS account administration activities in relation to their product?
 - How do VA stakeholders describe their current experience with the CMS account admin service?
 - To what extent are VA stakeholders currently involved in new account requests, account verification, and offboarding?

[Read the full research plan](#)

Research goals

For each CMS-supported product:

- Explore the possibilities for **CMS account governance**:
 - Does OCTODE have the resources in place necessary for governing CMS account administration for their products?
 - Are there one or more people in each product positioned to serve as an account administrator?
 - Which products would benefit from a secondary account admin role to manage day-to-day verification requests for a given section?

[Read the full research plan](#)

Research goals

For each CMS-supported product:

- Explore the possibilities for **CMS account policies**:
 - What kinds of risks do VA stakeholders anticipate to their product if account permissions, training requirements, or offboarding criteria aren't structured and enforced?
 - Besides training, do VA stakeholders have other criteria that must be met for granting new CMS accounts for their product?
 - When a member of their product team leaves their position, who is in charge of their offboarding?

[Read the full research plan](#)

Methodology

Method

8 stakeholder interviews with people who own or manage one or more CMS-supported product.



OCTODE PO



Public Websites Editor



Sitewide content lead



Facilities PO



VEO / Outreach hub PO



DEPO content strategist



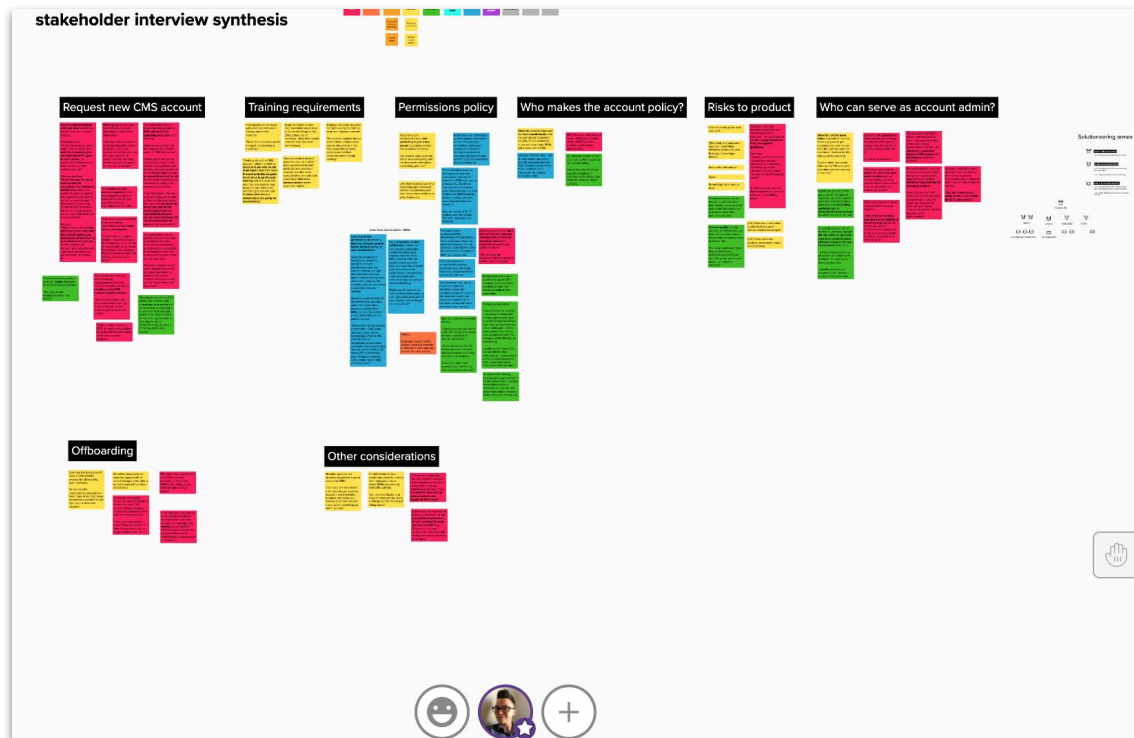
Vet Centers
Communications
Officer



VA benefits detail page editor

Method

Synthesis MURAL



Method

	Outreach hub	VAMC	Vet Centers	Benefits hubs	Resources and support	CLP	VA forms detail pages	Facility status	VHA services taxonomy	Home page	Banners + alerts	VA.gov megamenu
1. Policy owner												
2. CMS account admin												
3. Account point of contact												

Need for cms account admin roles by product

Research Findings

Key Findings

1. **Current process is unclear for both sides:** Neither the CMS team nor product stakeholders have a consistent process for CMS account management, and currently most things are handled ad hoc.
2. **Scalability needs structure:** Given the future scaling of most products, nearly all stakeholders were positive about the idea of a structured admin process for CMS accounts.
3. **Getting it wrong has specific risks:** Many stakeholders identified at least one way that incorrect access could pose a direct risk to their product.
4. **Desire for structured delegation:** Most stakeholders needed the ability to delegate authority to managing CMS accounts to people in roles one or two levels beneath them, and the roles followed a more or less consistent pattern.

1. Current process unclear

Both CMS team and stakeholders manage account needs ad hoc

- For some stakeholders, it's not obvious where they should go for CMS account requests.

*"I'll bother [name redacted] and and then they'll contact somebody else, and then you know **it's 15 different emails** and then we finally get to the right point contact." — Outreach hub*

1. Current process unclear

Both CMS team and stakeholders manage account needs ad hoc

- Lack of communication feedback loops between help desk and stakeholders makes current request process difficult.

*"On the request form **there's no way for me to indicate that I'm requesting it on someone's behalf**, other than in the comments section...and **it seemed like the responses were going just to me**, even though in the comment box I said, 'please work directly with this person to set up their account and let them know what they need.'" — Outreach hub*

1. Current process unclear

Both CMS team and stakeholders manage account needs ad hoc

- A smoother account admin process would ease some of the change management pain as responsibility gets delegated to decentralized offices.

*"We've asked a lot of the Vet Center district level staff, so any way to **streamline the account admin process** would be very helpful."* — Vet Centers

2. Scalability needs structure

Most stakeholders expressed the need to onboard an increasing number of users for their product in the near future.

- Given future scaling, nearly all stakeholders were positive about the idea of a structured admin process for CMS accounts, and most had some specific ideas about how they'd want it to go.
- Most stakeholders expressed that there were people positioned to serve in CMS account admin roles, including:
 - People who could set the cms account policy for their product
 - People who could request cms accounts for others, or verify requests for an account

"We have 300 sites, there are very few of us from a leadership perspective, not only in central office, but in the districts...so any way to streamline would be very helpful." — Vet Centers

3. Getting it wrong has specific risks

Many stakeholders identified at least one way that incorrect access could pose a direct risk to their product.

- Stakeholders speculated that if the wrong person mistakenly got access to the wrong product, (or if the account policy isn't carefully considered) risks could include:
 - Publishing poor quality content
 - Misrepresenting VA
 - Putting out inaccurate information about critical benefits
 - Malicious actions
 - Introducing internal labor issues

4. Desire for structured delegation

Most stakeholders needed the ability to pass off responsibility for managing CMS accounts to people in roles one or two levels beneath them

- Roles stakeholders described followed a more or less consistent pattern:
 - 1. Someone who can make decisions about what the rules are for their product
 - 2. Someone responsible for managing who has access for all editors within the product
 - 3. In some cases, someone who can verify access for editors, but only at their level of organization

"I have no interest in managing the day-to-day." -- OCTODE

4. Desire for structured delegation

Things account admins wanted to be able to do:

- Direct some users to a self-service request process
- Request an account on behalf of someone else
- Generate a report on demand of all users who have access my product so I can send communications out to current editors, or contact an editor about an issue with content.
- Generate a list of who has completed training

Additional Insights

- Multiple stakeholders stressed the importance of considering **regular turnover** in the new process, and some anticipated new employees as often as every few weeks.
- The availability of **training** and a **granular permissions structure** need to be in place before sitewide content would be comfortable bringing more SMEs/ business stakeholders in to the CMS.
 - Additionally, they mentioned the **lack of CMS notifications** as contributing to their hesitancy to onboard more CMS users for their product.
- Almost every stakeholder mentioned the **importance of redundancy** - having an alternative for each account admin role who can fill in during outages.
- Stakeholders generally didn't have much to say about **offboarding**, though some believed that a CMS account point of contact or supervisor could help notify when someone leaves their position.

Recommendations

Recommendations

1. Work with each product owner to **set a CMS account policy** that matches the current and near term state of their product.
2. **Formalize account roles for each product:** CMS account policy owner, CMS account admin, and optional CMS account point of contact.
3. **Implement features admins would need** to manage accounts, such as:
 - a. The ability to generate a report of all users for the product and its subsections
 - b. The ability to generate/access a training status report for product users

Recommendations

1. Work with each product owner to set a CMS account policy that matches the current and near term state of their product.

- CMS account policy = rules that CMS help desk, CMS account admins and account points of contact follow when granting CMS accounts and permissions.
- Document policy in the CMS Help Center as source of truth and use a standardized template for each product.
- CMS help desk will refer to policy to guide how they respond to account requests

Recommendations

Account policy example: VA Spas (fictional product)

- **Required training modules:** General CMS training modules, plus 5 VA Spas-specific modules
- **Steps to complete receive activated account:** 1. Do training 2. Report completion to CMS account admin 3. Wait until go-ahead that VA Spas is content-ready
- **Sections policy:** All new editors are assigned to the section for their local spa only.
- **Roles policy:** Local-level spa editors have permission to edit only. Spa district editors are given the permission to publish.
- **Account audit:** Accounts reviewed every 2 months by the account admin
- **Alternates:** There must be one alternate at every VA Spa who can sub in case of an outage

Recommendations

2. Formalize account roles



Policy owner

- Sets account policy
- Designates an admin (optional)
- Formalizes policy updates with the CMS team
- Owns change management associated with updates



Admin

- Manages all CMS accounts associated with their product
- Verifies permissions with help desk
- Monitors training status
- Requests accounts on behalf of others or directs users to self-service requests
- Delegates to points of contact when necessary (optional)



Point of contact

- Verifies permissions or request accounts for people working within their facility, system, or administration.
- They may also be tasked with notifying the CMS help desk when someone in their facility, system, or administration has left VA.

Recommendations

2. Formalize account roles

Most stakeholders needed the ability to delegate authority to managing CMS accounts to people in roles one or two levels beneath them, and the roles followed a more or less consistent pattern.

	Outreach hub	VAMC	Vet Centers	Benefits hubs	Resources and support	CLP	VA forms detail pages	Facility status	VHA services taxonomy	Home page	Banners + alerts	VA.gov megamenu
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Need for cms account admin roles by product

Recommendations

2. Formalize account roles. Example: VA Spas (fictional product)



Jane Xiong, policy owner

- Sets account policy
- “Hey Rachel, you’re admin for VA Spa accounts.”
- “I’m changing the policy to let all VA Spa editors have permission to publish. Let’s coordinate with the CMS team for account and change management.”



Rachel Kauff, admin

- Manages all VA spa accounts
- “I reviewed all the VA spa accounts this month, as specified in the policy. Let’s check on problematic editor Kev Walsh.”
- “Hey Josh, you’re responsible for verifying permissions for VA Spa District 6.”



Josh Arabelo, point of contact

- “Yes, Clarence Maeng should have an account for VA Spa Springfield.”
- “Kev Walsh is no longer with VA. Please deactivate his account.”

Recommendations

2. Formalize account roles for each product

So what?

- Having defined a policy owner gives help desk and training clarity about how to handle incoming CMS account requests.
- Using a templated format provides both structure and flexibility.
- Making this a separate role lets policy owners delegate the day to day management to someone else (the CMS account admin) if appropriate.

Recommendations

3. Implement features admins would need to manage accounts

- “As a CMS account admin, I need to **generate a report of all users for my product** and its subsections so I can...
 - Monitor account access
 - Get a list of email addresses of current editors so I can communicate with them
- “As a CMS account admin, I need to **generate a training status report** so I know who needs encouragement to complete their training.”

Recommendations

1. Other recommendations

- Create an offboarding hypothesis we can run by stakeholders.
 - Example: “If a CMS user doesn’t log in for six months, send a notification then deactivate their account.”

Proposed next steps

- Create standardized CMS account policy templates for the CMS help center
- Validate draft of CMS account admin roles with product owners
- Ask CMS policy owners document their product's current and near term policy
- Explore how account admin roles could be structured in the CMS

Not in scope (for now)

- Building the ability for CMS account admins to change roles and permissions in the CMS directly.
- Automating the CMS account request process