Sprint 1 Demo

Tuesday, May 3rd, 2022

Get to know the team

Core team

PRODUCT

Munish Sikka
Washington DC
Product Lead

Jordan White
Dallas, TX
Product Manager

Tami Corson
North Carolina
Clinical SME / Scrum

ENGINEERING

Shashank Khandelwal
Rockville, MD
Tech Lead

DESIGN

Thomas McCue
Oak Park, IL
Principal Designer
Director

Carl Dickerson
Atlanta, GA
Content Strategist
and Plain Language
Content Creator

Carolyn Williams
Chicago, IL
Experience Designer

Teagan Stephenson
Ft. Lauderdale, FL
Full Stack Engineer
1095-B Product Only

Executive team

Jeff Scheire
MO Studio

Marcy Jacobs
McKinsey & Co

Kevin London
Frog Design

Will Reynolds
SERVE Advisory
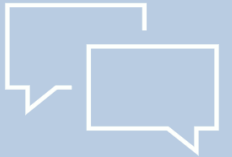
Ben Morris
Pluribus Digital

Travis Hoffmann
MO Studio

At the end of each sprint on Tuesdays, the team will run sprint reviews to showcase the sprint's work for approval. The purpose of this meeting is:

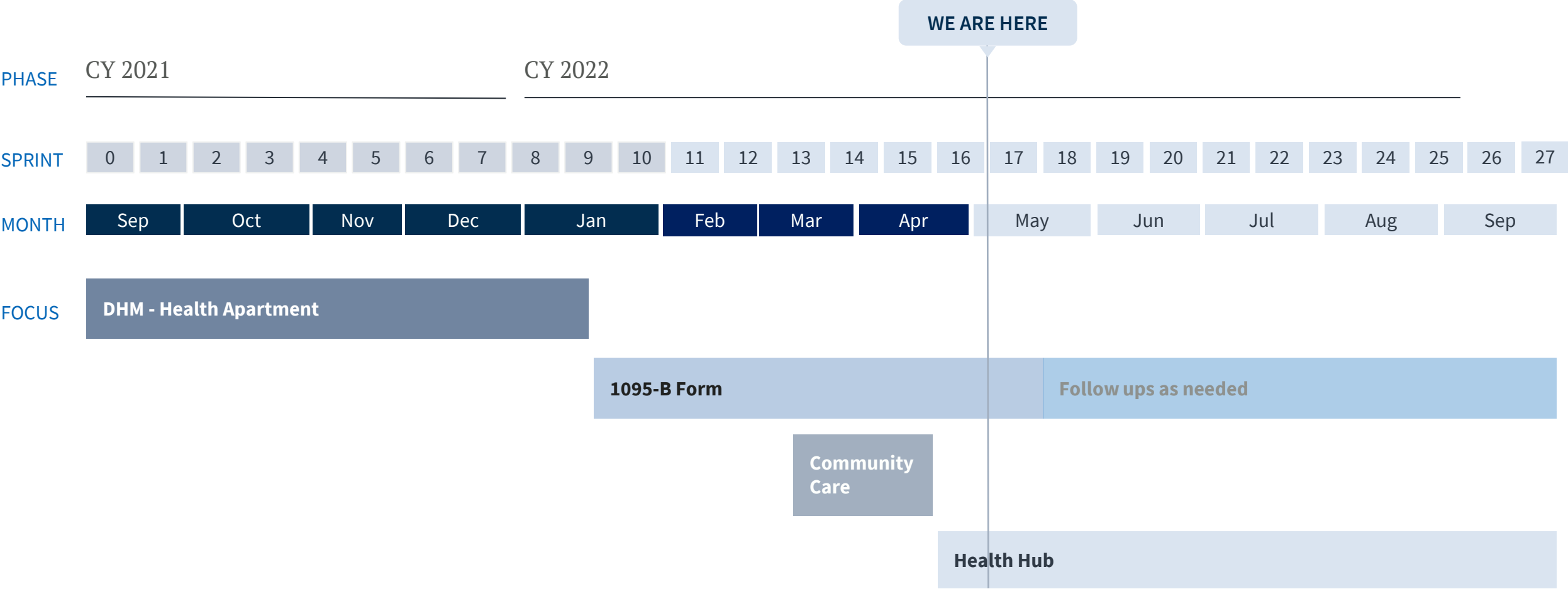**1** To demo the accomplishments or functionality that was built over the past sprint

2 To get feedback and insights early and often

3 To create transparency for anyone interested on the product and progress

CEDAR TO1 Overview

WE ARE HERE

PHASE

CY 2021

CY 2022

SPRINT

| 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 |

MONTH

| Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep |

FOCUS

DHM - Health Apartment

1095-B Form

Follow ups as needed

Community Care

Health Hub

Agenda

Sprint Goal: For sprint 1 we focused on understanding the product goals, discovery into current state, and development of initial project plan.

HEALTH HUB

- A. Product draft strategic plan & vision
- B. Business partner discovery
- C. Revised problem statement
- D. Existing research and gaps
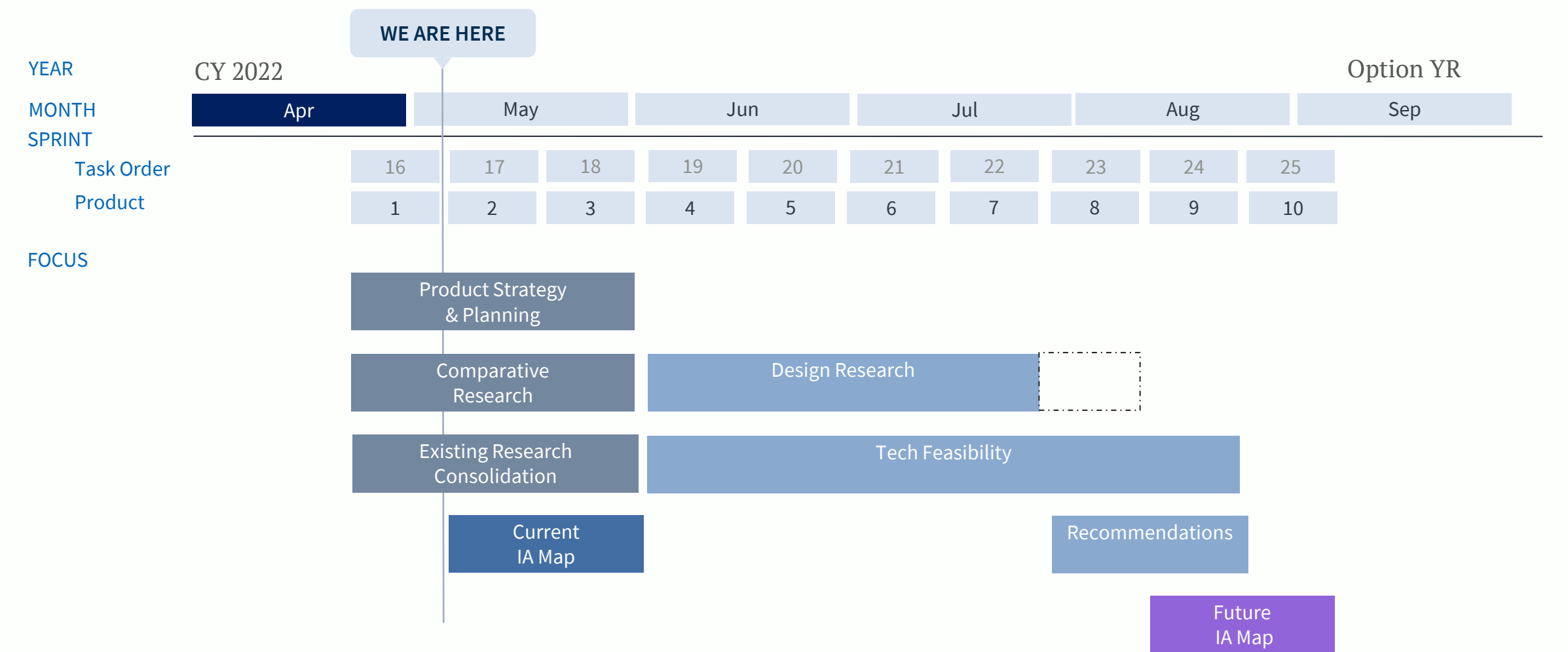- E. Comparative research

1095-B

- A. Updates on 1095-B

We welcome all feedback! Feedback will be collectively reviewed and prioritized appropriately based on where it stacks against other stories in the backlog as well as technical feasibility.

SPRINT 1 DEMO

Health Hub

Health Hub Strategic Roadmap v1

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YEAR	CY 2022									Option YR
MONTH	Apr	May		Jun		Jul		Aug		Sep
SPRINT										
Task Order	16	17	18	19	20	21	22	23	24	25
Product	1	2	3	4	5	6	7	8	9	10

FOCUS

- Product Strategy & Planning
- Comparative Research
- Design Research
- Existing Research Consolidation
- Tech Feasibility
- Current IA Map
- Recommendations
- Future IA Map

Health Hub Workplan v1

◆ Owned by design team   ◆ Owned by product/ engineering team   ◆ Release

WE ARE HERE

	SPRINT 1		SPRINT 2		SPRINT 3		SPRINT 4		SPRINT 5	
	Week 1: 04/20 – 04/26	**Week 2:** 04-27 – 05/03	**Week 3:** 05/04 – 05/10	**Week 4:** 05/11 – 05/17	**Week 5:** 05/18 – 05/24	**Week 6:** 05/25 – 05/31	**Week 7:** 06/01-06/07	**Week 8:** 06/08-06/14	**Week 9:** 06/15-06/21	**Week 10:** 06/22-06/28

Product & Delivery

- Build understanding of product and product goals
- Build Roadmap
- ● Kickoff
- Build initial workplan and backlog

User Experience & Design

- Comparative research
- Business partner discovery
- Build initial research plan
- Conduct research
- Consolidate existing research
- Current state mapping

Engineering & Development

- Tech Discovery
- Tech Feasibility

Project Vision & Goals

VISION — create the best possible experience for veterans on va.gov

VALUE
- improve veteran satisfaction re managing their health services online
- veterans and their families can find a single authoritative source of information
- all users are able to easily navigate to appropriate content

METHODS
- design research & validation
- tech feasibility analysis

OBSTACLES — OCTO alignment

MEASUREMENT — OCTO satisfied!

Other measurements to consider:

- Veteran satisfaction and desire
- Measurements for the recommendations post-implementation

B

We started conversations with experts currently building health content on VA.gov

[User Story](link): Conduct business partner discovery

Business partners we've spoken with:

✓ Danielle Thierry

✓ Meg Peters

✓ Mikki Northuis

✓ Tracey Mulrooney

Business partners we're planning to speak with:

❑ Mikki Northuis (follow up)

❑ Dave Conlon

❑ Samara Strauss

❑ Lauren Alexanderson

❑ Beth Potts

❑ Jeff Barnes

[Link](link)

C

We aligned on product by reformulating problem statements into words that convey actionable items for our team

User Story: Further develop problem statements to include our understanding of problem

Problem Statements:

1. How might we best serve Veterans who don't have healthcare learn about the benefits and apply for them?

2. How might we create the best personalized experiences for Veterans with healthcare who want to manage their care online?

3. How might we ensure all Veterans can learn about their benefits and get help at any point?

Link

D

We consolidated and evaluated current research on products within the health space

User Story: Discover and consolidate current state research
User Story: Determine gaps in available research

Existing

- Content Strategy for Veteran benefit experience
- Product brief for Health Apartment
- Health care hub evolution
- Model for auth and unauth
- Manage-only APT sitemap
- Personalization 2.0 discovery
- Veteran journey map
- 1010-ez Application research
- Resources pilot (in progress)

Relevant gaps to explore

- The transition of learning to managing health tasks
- The cycle of manage to learn to manage
- How a Veteran learns about their health benefits

Link

We conducted a comparative analysis of industry standards

[User Story](#): Conduct comparative research of similar industries or institutions

Summary:
We analyzed experiences analogous to va.gov to discover potentially useful patterns, precedent, and best practices as related to content strategy that supports or guides users through application for and management of benefits.

Key Findings:
- The veteran experience is unique, with few/no direct analogs
- A fragmented landscape has few emergent patterns
- Common strategies include uncategorized and distributed content, context relevant content, and consolidated knowledge base
- User need for learning, guidance, or support content in an ongoing basis (versus just initial engagment) is unclear

Conclusion
- The content strategy and IA landscape is marked by lack of clear best practices or useful patterns
- "Learn, Apply, & Manage" may be a useful way to organize content
- More research is needed to understand more about the what and when of content need across the Health benefit engagement
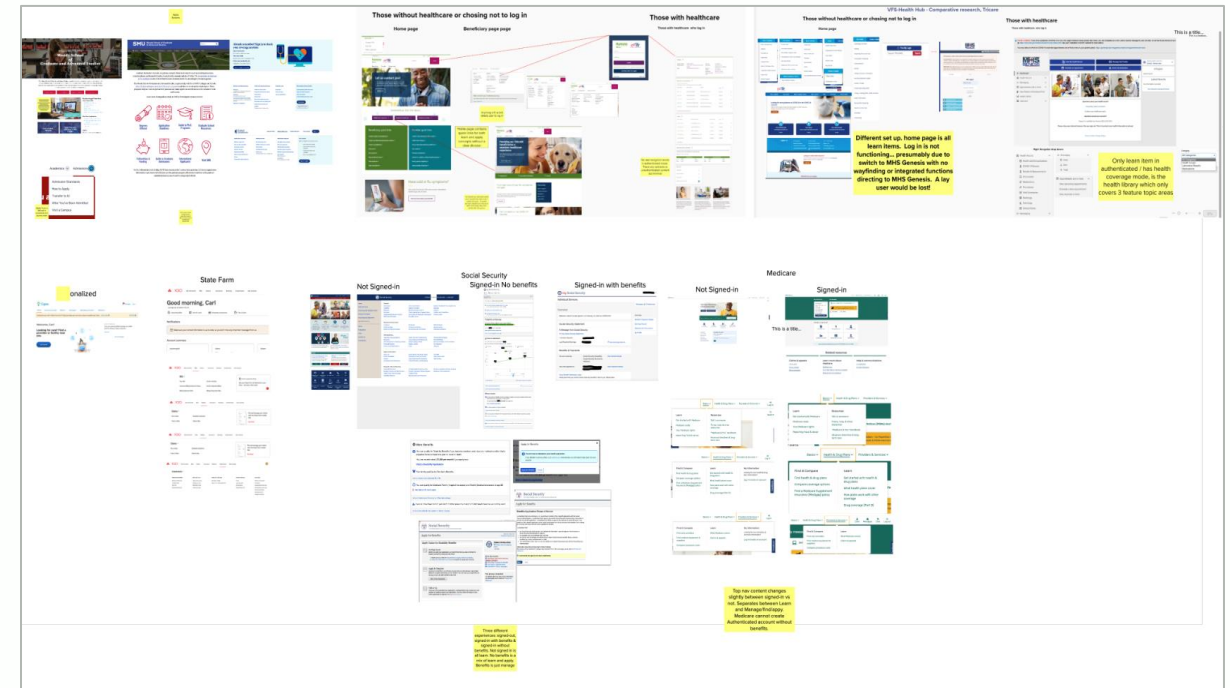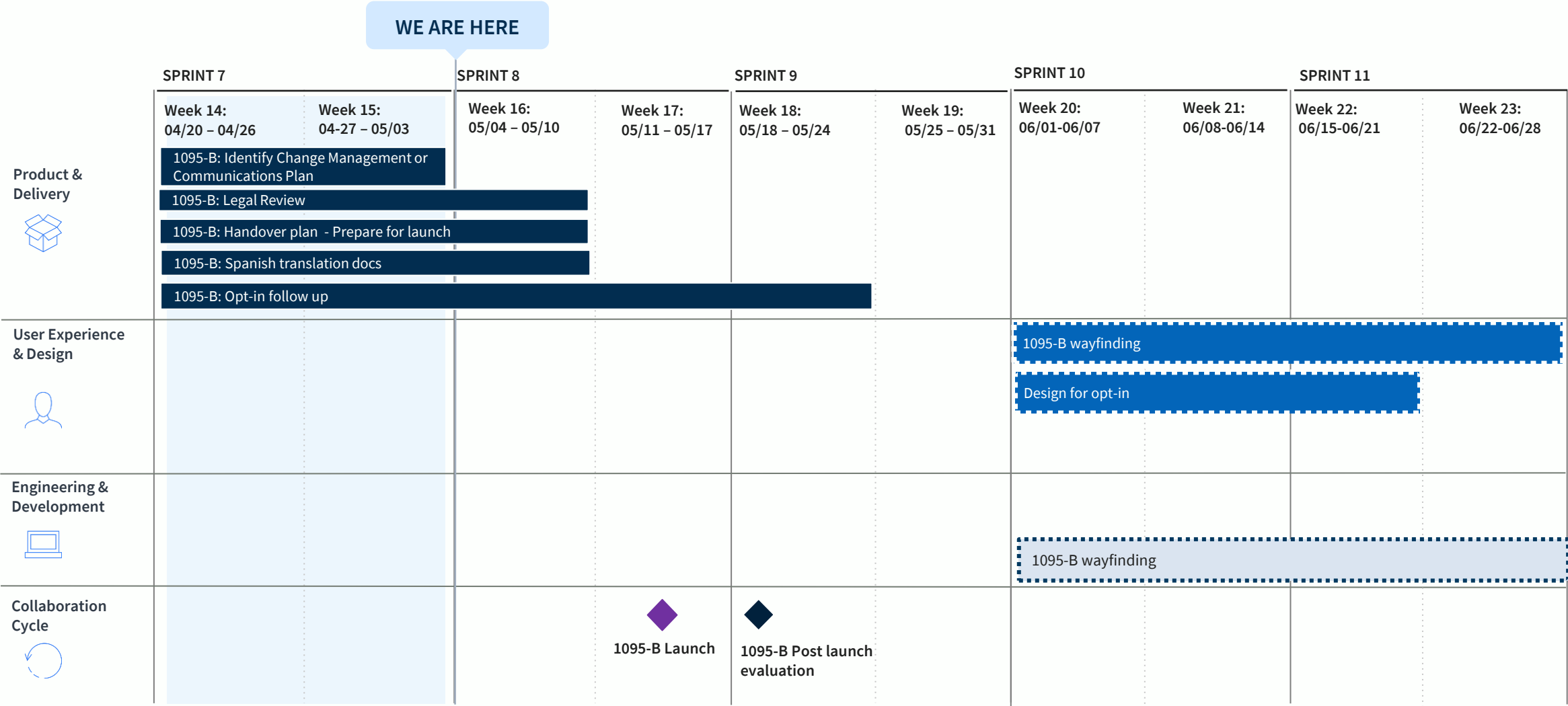

Link to Mural

SPRINT 1 DEMO

1095-B Status Update

1095-B Workplan

◆ Owned by design team ◆ Owned by product/ engineering team ◆ Release

	SPRINT 7		SPRINT 8		SPRINT 9		SPRINT 10		SPRINT 11	
	Week 14: 04/20 – 04/26	Week 15: 04-27 – 05/03	Week 16: 05/04 – 05/10	Week 17: 05/11 – 05/17	Week 18: 05/18 – 05/24	Week 19: 05/25 – 05/31	Week 20: 06/01-06/07	Week 21: 06/08-06/14	Week 22: 06/15-06/21	Week 23: 06/22-06/28

Product & Delivery

- 1095-B: Identify Change Management or Communications Plan
- 1095-B: Legal Review
- 1095-B: Handover plan - Prepare for launch
- 1095-B: Spanish translation docs
- 1095-B: Opt-in follow up

User Experience & Design

- 1095-B wayfinding
- Design for opt-in

Engineering & Development

- 1095-B wayfinding

Collaboration Cycle

- ◆ 1095-B Launch
- ◆ 1095-B Post launch evaluation

We continued to monitor 1095-B developments leading to launch and post-MVP build

User Story: PM team to f/u on VA 508 accessibility ticket
User Story: PM team to f/u on VA profile ticket for opt-in
User Story: PM team to f/u on HEC legal review
User Story: PM team to f/u on documents for Spanish translation
User Story: Collaboration cycle: Staging review
User Story: 1095-B Team staging review accessibility checklist
User Story: Collaboration cycle: Analytics implementation

Updates on launch and opt-in blockers:

- Still awaiting full legal approval from OGC (4.29.22)
- VA Profile ticket with Nazmul Alam and he has not been free to update ticket to push forward (4.28.22)
- VA 508 office has passed ticket to Mr. Sheehan for guidance (4.26.22)
- Awaiting Spanish translation (4.29.22)

508 Ticket , VA Profile opt-in ticket, 1095-B updates 5.3.22

Blockers for 1095-B launch

BLOCKER	OWNED BY	ACTION NEEDED	DATE ENTERED	STATUS	NOTES
Legal review	Tarsha Tremble (Business Owner)	▪ Business Owner is seeking a POC with the Office of General Counsel to understand requirements for legal review and timeline	Sprint 3 - 3/2/22	🔴	Team is awaiting further word on legal review after follow up from Chris Johnson
PDF Accessibility	Tarsha Tremble (Business Owner)	• Team received PDF from IRS, but PDF is still not accessible once it is populated with data	Sprint 3 – 3/3/22	🔴	Team is awaiting further word from 508 office

1095-B Remaining actions, with external dependencies

ITEM	WORK STREAM	ACTION NEEDED	TARGET COMPLETE DATE	PREREQUISITE
Tech refinements & testing	Tech	▪ Update backend and react widget as needed based on staging review and UAT feedback ▪ Build out and conduct testing	TBD	Product dark launched
UAT	Product & Tech	▪ Follow Collaboration Cycle guidelines for UAT ▪ Identify Veterans within VA to conduct UAT, send access, and follow up to ensure testing complete	TBD	Product dark launched
1095-B Opt-in	Product	▪ Follow up with HEC and Profiles team to ensure opt-in is done ▪ Update draft communications and announcement plans, based on when opt-in will be launched	April - May	HEC and Profiles commitment to building opt-in
Legal Review	Product	▪ Work with Tarsha to complete legal review	March – May	POC name from Tarsha
Post Launch Check- In	Product	▪ Complete Collaboration Cycle milestone to KPIs post launch	TBD (One month after launch and announcement)	Product launched in prod
Links from VA.gov pages to 1095-B	Product & Design	▪ Work with IA team to have other identified pages within VA.gov (e.g., ACA page) link to the 1095-B page ▪ Work with IA team to have 1095-B page added to navigation and be found in VA.gov search	May or later	Product launched in prod; aligned on comm plan with Tarsha, Tracey
1095-B update strategy	Product	▪ Align on who will own 1095-B long term, including updating the PDF template each year	May or later	Product complete and launched in production
Communications to announce launch	Product & Design	▪ Work with Tarsha and HEC team to refine drafted communications and align on plan and timeline to announce 1095-B launch to Veterans ▪ Work with VA Notify team to build and launch communications on their platform	October - December	Product launched in prod; aligned on communication plan with Tarsha/Tracey

SPRINT 1 DEMO

Sprint Deliverables

Sprint 1 Deliverables – Health Hub

EPIC	STORY		ESTIMATE	ASSIGNED	OUTPUT	REVIEWED W/ VA-PO	SPRINT TEAM GOAL COMPLETED?
Tech	#40433	Further develop problem statements to include our understanding of problem	5	Shashank	▪ Revised statements ▪ User personas	5/3/22	✓
Tech	#39922	Platform orientation [Shashank Khandelwal]	5	Shashank	▪ Ticket	5/3/22	✓
Design	#40427	Discover and consolidate current state research	8	Carl	▪ Research discovery	5/2/22	✓
Design	#40432	Conduct business partner discovery	5	Carolyn	▪ Initial discovery notes 4/25 ▪ Mtg w/ Meg 4/29 ▪ Mtg w/ Danielle 4/29	4/29/22	✓
Design	#40429	Conduct comparative research of similar industries or institutions	13	Thomas Carolyn	▪ Mural	4/29/22	✓
Design	#40008	Platform orientation [Carolyn Williams]	5	Carolyn	▪ Ticket	5/3/22	✓
Design	#40009	Platform orientation [Thomas McCue]	5	Thomas	▪ Ticket	5/3/22	✓
PM	#40431	Determine gaps in available research	5	Jordan	▪ NR	5/5/22	✓
PM	#40442	Create business partner communication / discovery plan	1	Tami	▪ HH Comm Log	4/21/22	✓
PM	#40441	Create team cadence with key VA personnel	1	Tami	▪ Cadence	4/20/22	✓
Product	#40754	Develop initial strategic roadmap & vision	5	Munish	▪ Demo slide 7 - 9	5/2/22	✓

Sprint 1 Deliverables – 1095-B

EPIC	STORY	ESTIMATE	ASSIGNED	OUTPUT	REVIEWED W/ VA-PO	SPRINT TEAM GOAL COMPLETED?
Product	[#40455](#) PM team to f/u on HEC legal review	0	Tami	▪ [1095-B Updates](#)	5/3/22	✓
Product	[#40454](#) PM to f/u w/ VA-PO on HEC documents being translated into Spanish	0	Tami	▪ [1095-B Updates](#)	5/3/22	✓
Product	[#39723](#) PM team to f/u on VA Notify ticket for opt-in	1	Tami	▪ [#CMDMRP-2269](#) ▪ [1095-B Updates](#)	5/3/22	✓
Product	[#39722](#) PM to f/u on VA 508 accessibility support ticket	1	Tami	▪ [YourIT # RITM6608047](#) ▪ [1095-B Updates](#)	5/3/22	✓
Product	[#38351](#) Collaboration cycle: Staging review [1095-B]	0	Jordan	▪ [Ticket](#)	5/3/22	✓
Tech	[#36175](#) Collaboration cycle: Analytics implementation [1095-B]	0	Teagan Shashank	▪ [Ticket](#)	5/3/22	✓
Tech	[#38387](#) 1095-B Team staging review accessibility checklist	0	Teagan Shashank	▪ [Ticket](#)	5/3/22	✓

SPRINT 1 DEMO

Preview of Sprint 2

Sprint 2 of Health Hub will focus on

*Stories subject to change during Sprint planning

HEALTH HUB

- A. Refine product roadmap and workplan
- B. Continue business partner discovery
- C. Align on research approach
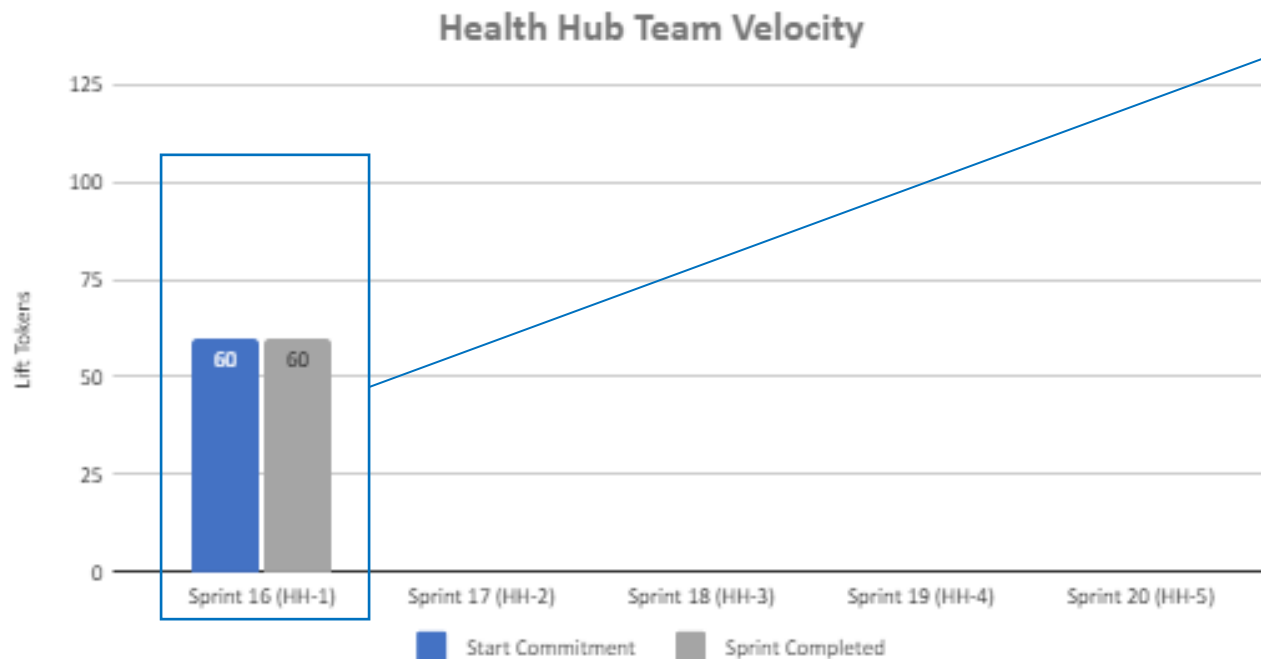- D. Draft current state of Health Hub IA

1095-B

- A. Updates on 1095-B

Appendix

Health Hub Team velocity

Health Hub Team Velocity

Velocity details

- Velocity estimated in story points, using Fibonacci

- Velocity in Sprint 1 accounted for 8 team members

- 60 total story points were completed; Team committed to 60 story points at beginning of the sprint.

  - 7 Stories represent 1095-B work (2 points) and remain blocked / stalled related to HEC legal review, Spanish translation, Opt-in function request, and VA 508 office assistance request

Project risks and mitigation strategies

Submitted as part of the Monthly Report for March

RISK AND IMPACT	MITIGATION STRATEGY	DATE		STATUS	NOTES
		ENTERED	CLOSED		
IRS stakeholder is outside of VA ecosystem. Building without guidance or legal review regarding compliance with IRS regulation could result in risk.	Conduct research on available information surrounding current IRS 1095-B tax form regulations. Seek legal review through VA resources as directed by VA-PO and Business Owner	1/20/22	2/11/22	🟢	VA Business Owner clarified that IRS review is not needed
Team had previously confirmed with Business Owner that legal review was not needed. Business Owner clarified that legal review would be needed as of March 2nd	Business Owner is seeking a POC with the Office of General Counsel to understand what is needed and potential launch impact	3/2/22		🔴	Launch blocker
Data requires storage in a S3 bucket that the enrollment system can have access to in production; process to create the staging and production bucket does not have a clear timeline. Without the S3 bucket in prod with enrollment system access, product cannot be built in prod	Daily follow-ups with Jesse House and Mike Chelan (infrastructure team)	3/1/22	3/24/22	🟢	S3 bucket now in place. Risk resolved.
Business owner raised User Acceptance Testing should be done with HEC Call Center	Requested Business Owner to schedule UAT with required individuals for mid-March and book as early as possible	3/2/22	3/25/22	🟢	Business owner confirmed that UAT can be done through Collaboration Cycle and does not have to be done with HEC team
Feedback from Content and IA Review has taken over a week to come in; feedback is changing our proposal for the H1 and delaying confirmation of where the 1095-B landing page should live, which in turn delays our ability to complete the front end (top nav and side nav bars)	Design team pushing on IA team to confirm final answer of where 1095-B landing page should live and what the H1 header title should be	03/04/22	3/8/22	🟢	URL confirmed 3/7 EOD; IA review now closed
Designs were approved as part of Midpoint Review. Afterwards, Sitewide Content stated they would need to build our front end in Drupal and change our designs, impacting our in-flight build.	Design team met with Sitewide Content to align on redesigned front end. Tech working with Sitewide Content to send over our dynamic widget to be pulled into their static front end. Sitewide Content now owns the front end build.	3/10/22		🟠	Launch date dependent on Sitewide Content ability to launch front end

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Sprint 1 will run April 20 to May 3rd

◆ Owned by design team   ◆ Owned by product/ engineering team   ◆ Release

WE ARE HERE

	SPRINT 1		SPRINT 2		SPRINT 3		SPRINT 4		SPRINT 5	
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Product & Delivery	1095-B: Identify Change Management or Communications Plan									
	1095-B: Legal Review									
	1095-B: Handover plan - Prepare for launch									
	1095-B: Opt-in follow up									
	1095-B: Spanish translation docs									
		HH: Charter	HH: Develop backlog + Vision Framework		HH: Roadmap					
User Experience & Design	1095-B: Wayfinding plan						Testing prep & recruiting	● Voice of Veteran		● Voice of Veteran
			HH: Discovery		HH: Stakeholder Interviews					
			HH: Current State Journey Map		Prioritized plan					
Engineering & Development			HH: Tech discovery		HH: Stakeholder Interviews					
									HH: Proposed tech integrations based off research findings	
Collaboration Cycle	◆ **1095-B: Launch Date Dependent on Legal Review Completion**				**Midpoint Review** ◆		◆ **Research Plan Review**		◆ **Research Plan Review**	

*Does not show post-MVP Validate phase meetings in Collaboration Cycle, such as Full Accessibility Audit and Post-Launch Check In;
Contact Center Review adjusted to 3 weeks before launch as approved by Jason Woodman