

VA IDENTITY PRODUCT

# Sprint 2 Demo

Wednesday, September 14, 2022

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VA



U.S. Department  
of Veterans Affairs



# Get to know the team

## Executive team



**Jeff Scheire**  
MO Studio



**Travis Hoffman**  
MO Studio



**Kevin London**  
Frog Design



**Kit Casey**  
Design Director



**Samara Watkiss**  
Assoc. Design  
Director



**Pablo Cruz**  
Sr. Product  
Manager



**Mike Prusaitis**  
Assoc. Director,  
Program Management



**Steve Dickson**  
Engineering Lead,  
Key Personnel



**Bri Mazzio**  
Sr Interaction  
Designer



**Marissa Klein**  
Sr. Strategist



**Paul Knipper**  
Visual Designer

# Key Personnel joining the team



**Name:** Elizabeth Koch (Blue Tiger)

**Role:** Product Owner

**Start Date:** 09/26/2022

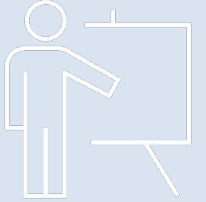
**Location:** Southampton, Massachusetts

<https://www.linkedin.com/in/elizabethkoch/>

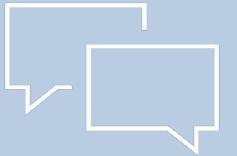
At the end of each sprint on Wednesday, the team will run sprint reviews to showcase the sprint's work for approval.

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



# Agenda

## Sprint 2 Goal:

- Kick-off the Discovery Phase
- Complete team fingerprinting and submit forms for background checks 🎉
- Understand areas of focus, priorities and success criteria
- Identify key SMEs and business owners to interview, and begin interviewing
- Establish recurring meeting cadences and communication channels
- Begin documenting existing identity proofing flows (MHV, MHV inherited proofing, login.gov)
- Begin documenting non-veteran use cases

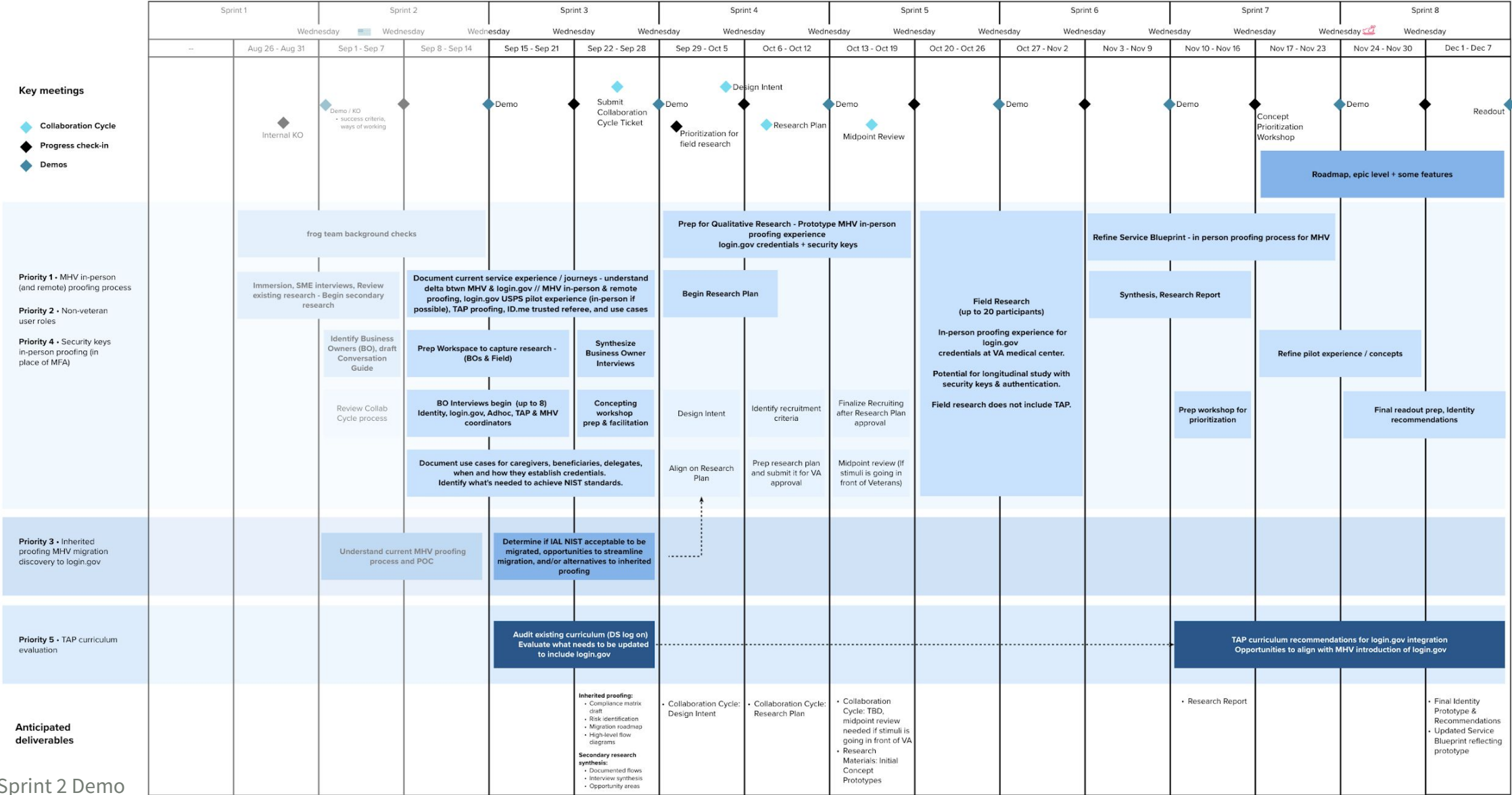
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5 min	Discovery Phase status
5 min	Our understanding
30 min	What we've learned so far
10 min	Questions
—	Appendix

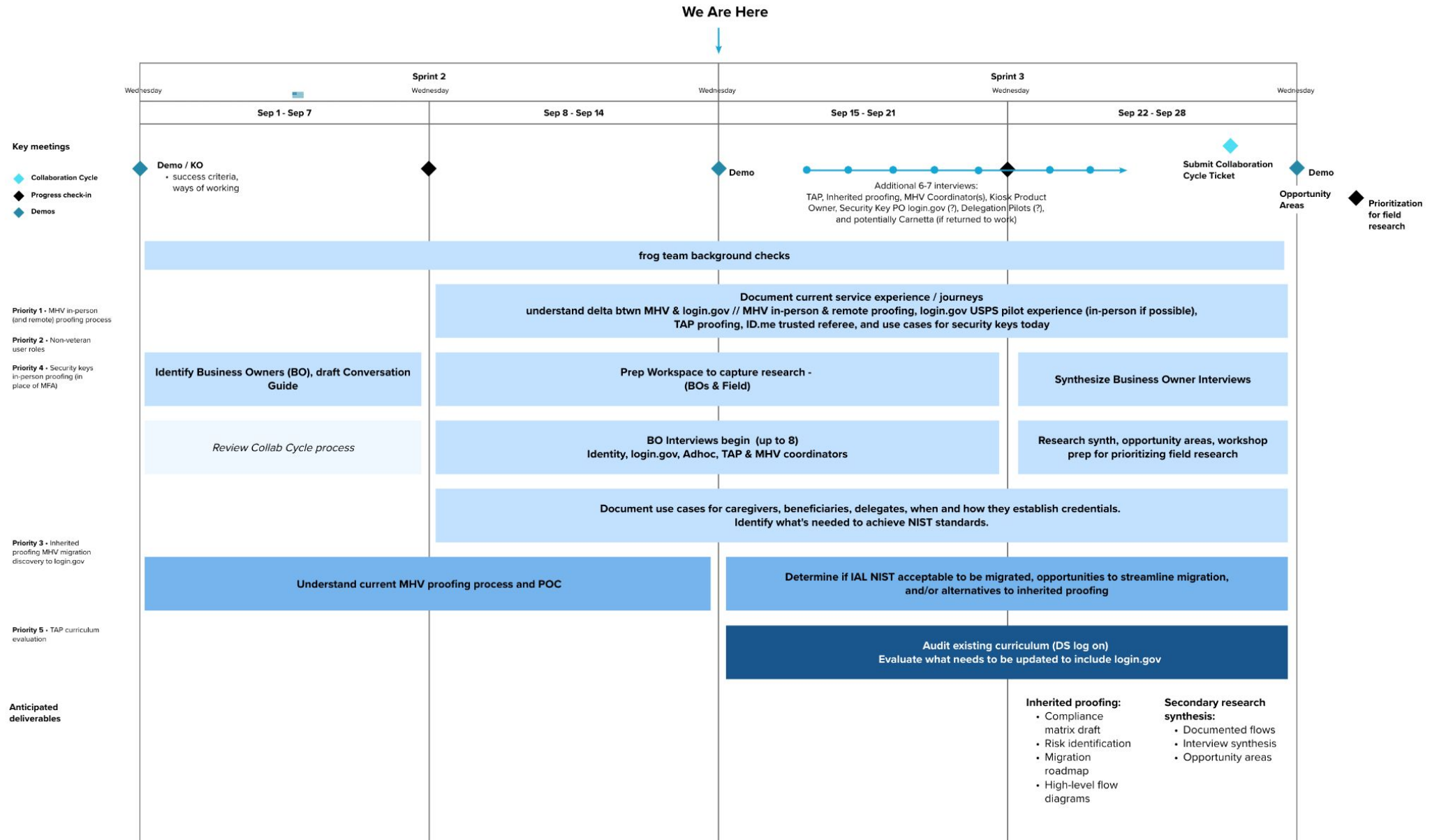
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# Our plan

We Are Here



## A closer look to where we are...



# Dependencies, risks, blockers

## Dependencies:

- Getting team fully through VA onboarding
- Coordination required interviews
  - Carla Hill
  - Melissa Rebstock
- Collaboration Cycle (in advance of Field Research - starts Oct 26)
- Velocity Tracking
  - VA Github + Zenhub instance creation
- Follow Up items from Login.Gov
- Travel Planning (if required for research)

## Risks:

- VSP Team interview pushed out: due to team illness (Monday)
- MHV Coordinator Interviews & Onsite Observations

## Blockers:

- Transition Experience HCD research findings recording ACCESS (TAP related)



THE ASK

# Our understanding

# Mission and objectives

## Mission

The CEDAR IDIQ will connect VA employees with industry partners to deliver high-quality, digital products following modern best practices to improve service delivery to Veterans.

## Objectives

- Give VA streamlined access to a small group of exceptional companies that specialize in agile software development and user-centered design
- Create a contract mechanism that incentivizes VA employees and contractors to deliver rapidly following private sector best practices
- Promote the principles of Agile and DevOps culture in VA
- Support VA's digital modernization strategy to solve tough technology challenges facing VA

# Product vision

## VISION

- One sign-on to access all products and services.
- Veteran choice of “public” or “private” credential option for VA.gov

## HOW

- Use human-centered design to consolidate ways to sign on to VA.gov
- Migrate users to their choice of Login.gov and ID.me; robust, compliant credential solutions

## WHY

- Users are frustrated and confused because they must go to multiple websites for benefits
- Multiple ways to sign on adds to the confusion
- Current sign on options have usability, security, and compliance issues

## TO ACHIEVE THIS, WE NEED TO DELIVER ON...

### Simplicity

Veterans need a simple way to access all VA sites

### Guidance

Veterans need efficient customer service

### Trust

Veterans believe there is an inherent risk to submitting sensitive information via the internet

### Continuous discovery and Veteran feedback

Taking time to continually test and validate through prototyping

### Adherence to standards

Compliance with standards such as NIST 800-63-3

# Evolution of Focus

## FROM

1. Define Non-Veteran user roles (*e.g., dependents, beneficiary, caregiver, delegate, VSO representatives, claim agents and attorneys, fiduciary, Power of Attorney (POA), 3rd-party organizations that receive payments*)
2. MHV Coordinators in person proofing (and remote video)
3. Inherited Proofing/Migrate users in Premium status
4. Update Transition Assistance Program (TAP) Curriculum to remove DS Logon and include Login.gov
5. Email/comms outreach for DS Logon MFA rollout

## TO

1. MHV in-person (and remote) proofing process
2. Non-veteran user roles focusing on Caregivers, Beneficiaries, and Delegates
3. Inherited proofing/Migration of MHV users to login.gov
4. Security keys in-person proofing (in place of MFA)
5. TAP curriculum evaluation

# Areas of focus

## Priority 1

### MHV Coordinators in person proofing (and remote video)

MHV Coordinators have direct contact in-clinic with Veterans nationwide, and therefore have greater understanding of various challenges Veterans face. MHV Coordinators have potential to guide the migration toward login.gov especially for Veterans needing in-person proofing.

**Susan Haidary • Theresa M Hancock • Carnetta Scruggs** *(when available)*

## Priority 2

### Non-veteran user roles focusing on Caregivers, Beneficiaries, and Delegates

There are hosts of non-veteran users that would require login.gov and related identity proofing. Currently there are no VA-wide agreed upon definition of these users or clarity on their use cases and needed levels of access. The primary user roles to investigate are delegates, caregivers, and beneficiaries. These individuals will need the ability to identity proof in person at VA facilities.

**Susan Haidary • Theresa M Hancock • Carnetta Scruggs** *(when available)*

## Priority 3

### Inherited proofing/Migration of MHV users to login.gov

There is an opportunity to leverage previous identity proofing to streamline the transition to login.gov for existing users. Differing security standards of legacy proofing options will what is required to meet Login.gov standards. The end goal is to simplify the migration process for existing users.

**Melissa Rebstock**

## Priority 4

### Security keys in-person proofing (in place of MFA)

Some users of struggle with using Multi Factor Authentication. Could MHC Coordinator to provide these users with security keys as an alternative?

**Susan Haidary • Carnetta Scruggs** *(when available)*

## Priority 5

### TAP curriculum evaluation

The TAP curriculum is out of date when it comes to login for VA services and benefits. It should be updated to remove DS logon and encourage users to use login.gov from the start. *This area has unknowns, a lack of contact points and relationships, and a lack of general knowledge.*

**Dr. Carla Hill • Melissa Rebstock**

# What we've learned so far

# My HealtheVet

## Interview Objective

Understand the processes, roles, user experience, and challenges around setting up and accessing a My HealtheVet premium account. In particular focusing on:

- MHV coordinators & in-person proofing
- The relationship between basic and premium accounts
- Remote trusted referee proofing
- Multi-factor authentication options and challenges
- Veterans' experiences with MHV account creation and access
- Non-Veterans' experiences with MHV account creation and access

## Interviewees

### **Theresa M Hancock**

Director - My HealtheVet at  
Department of Veterans Affairs

### **Susan Haidary**

National Stakeholder Manager at  
Department of Veterans Affairs

*“[Getting login right] is the foundation of getting everything else right.”*

Theresa M Hancock

*“To get the full suite of what My HealtheVet has to offer, all the bells and whistles, every feature they need to have a premium account.”*

Susan Haidary



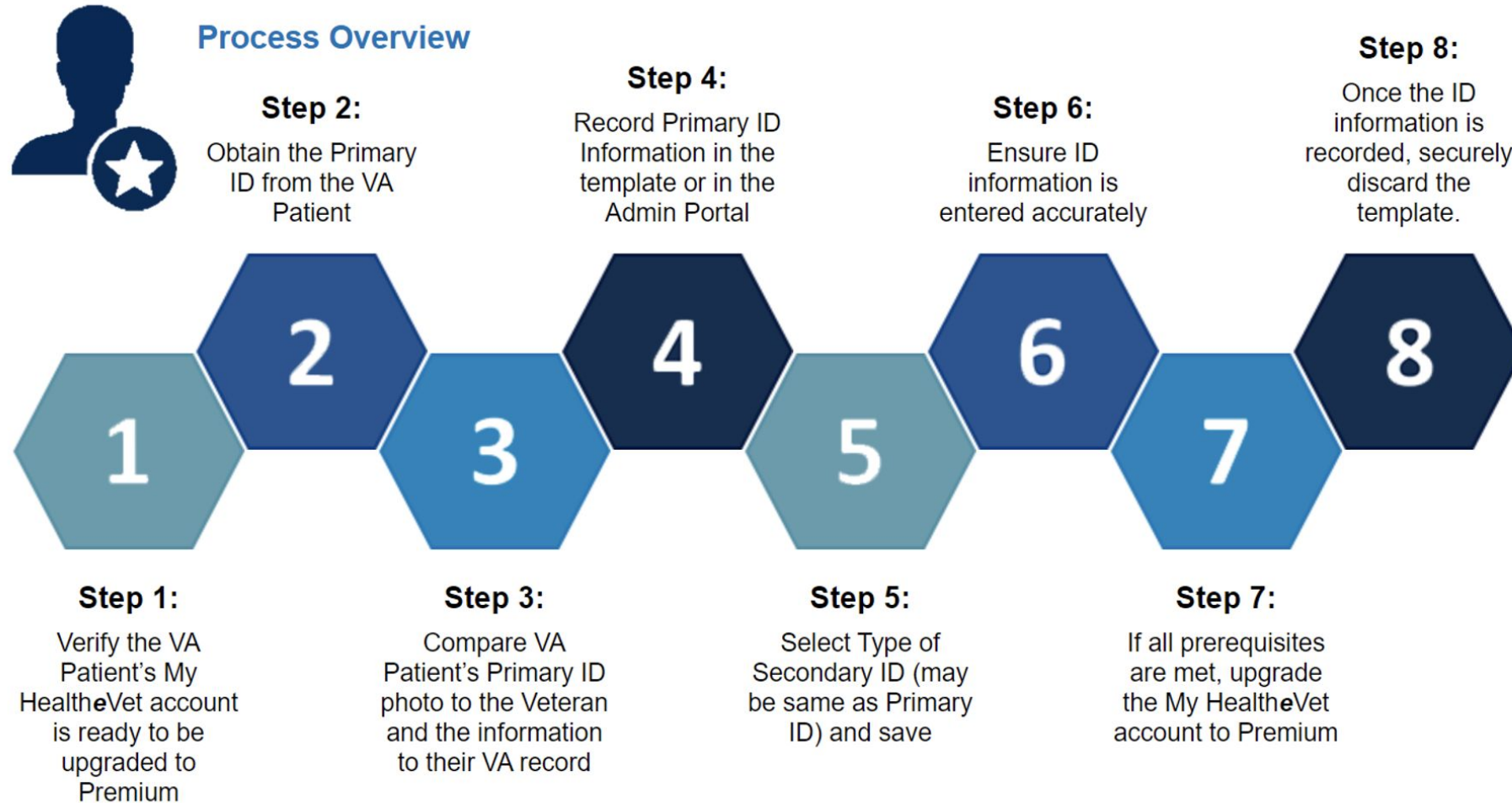
# My HealthVet - Key Takeaways

- Providing access options that work for all Veterans is top priority, without access Veterans cannot use the benefits or services available to them
- Basic account setup is the first step to a premium account and often requires in-person support
- Premium MHV accounts require identity proofing, and allow users to access medical records, communicate with providers, and order prescriptions
- The reality is that caregivers access MHV using veteran credentials, so MHV needs to plan for it, not forbid it
- MHV staff only recommend what they feel comfortable using and teaching, so timely training is key
- Veterans feel unheard and rate usability as very low—a surprise to those who built login and MFA solutions

# MHV premium users

	My HealtheVet Basic	My HealtheVet Premium
<b>Requirement</b>	<ul style="list-style-type: none"><li>- Anyone can register on My HealtheVet starting with a Basic account.</li><li>- A Basic account provides limited access to features in My HealtheVet that you self-enter</li></ul>	<ul style="list-style-type: none"><li>- Once your account is connected to your VA/DOD records, your account can be upgraded to Premium</li></ul>
<b>Process</b>	<ul style="list-style-type: none"><li>- Can be done online or in-person at VA Medical Center</li></ul> <p>Online via My HealtheVet:</p> <ul style="list-style-type: none"><li>- Complete the registration form—information collected: Name, DOB, SSN, Gender, Email Username, Password</li><li>- Accept the Terms and Conditions</li><li>- Select Create Your Account button</li></ul>	<ul style="list-style-type: none"><li>- Can be done online or in-person at VA Medical Center</li><li>- Online: Must create ID.me (IAL2)/DS Logon to complete identity proofing</li><li>- In-person: You'll need to bring a government-issued photo ID. This can be either your Veteran Health Identification Card or a valid driver's license.</li><li>- If the primary ID information does not match the users official VA medical record, a secondary form of ID, such as a social security card, is required.</li><li>- Resources: local My HealtheVet Coordinator, a member of Veteran's VA health care team, My HealtheVet Help Desk</li></ul>

# MHV premium users: In-person upgrade



\*MHV Authenticator Role Training - via TMS

# MHV premium users

	My HealtheVet Basic	My HealtheVet Premium
<b>Benefits</b>	<p>Access to your personal information located in VA or DoD systems.</p> <p>With a Basic account you may use My HealtheVet to:</p> <ul style="list-style-type: none"> <li>- Add information to a personal health journal about over-the-counter medications, allergies, military health history, medical events, tests, and allergies</li> <li>- Record and track personal information such as contact information, emergency contacts, health care doctors and providers, and health insurance information</li> <li>- Record and track personal health measurements (blood pressure, blood sugar, cholesterol, heart rate, body temperature, weight, pain level, etc.) in Vitals and Readings</li> <li>- Print a health insurance wallet ID card with the personal information entered into the personal health record</li> <li>- Set personal goals. My Goals makes it easy for you to set goals, identify your strengths and tasks, to overcome obstacles, and track your progress. My Goals can be used to help your VA health care team understand what is important to you.</li> <li>- Use the VA Blue Button (Download My Data) to view, save, print, or download and save your self-entered information; then share this with your caregiver, non-VA provider or others you trust. Your self-entered information may include: <ul style="list-style-type: none"> <li>- Activity Journal</li> <li>- Allergies</li> <li>- Family Health History</li> <li>- Food Journal</li> <li>- Health Care Providers - Health Insurance</li> <li>- Immunizations - Labs and Tests</li> <li>- Medical Events</li> <li>- Medications and Supplements</li> <li>- Military Health History</li> <li>- My Goals: Current Goals</li> <li>- My Goals: Completed Goals</li> <li>- Treatment Facility</li> <li>- Vitals and Readings</li> </ul> </li> </ul>	<p>Upgrading to a Premium account gives users full access to My HealtheVet features. With a Premium Account you may use My HealtheVet to view key portions of your VA health record, such as:</p> <ul style="list-style-type: none"> <li>- VA Admissions and Discharges (including discharge summaries) - Discharge Summaries are available 36 hours after they are completed</li> <li>- VA Allergies</li> <li>- VA Appointments (future)</li> <li>- VA Appointments (limited to past 2 years)</li> <li>- VA Demographics</li> <li>- VA Electrocardiogram (EKG) (EKG dates are no longer updated. You may continue to view your historical EKG dates.)</li> <li>- VA Immunizations</li> <li>- VA Laboratory Results: Chemistry/Hematology/Microbiology - VA Laboratory Results are available 36 hours after they have been verified. Depending on the type of test, some laboratory results may not be available right away.</li> <li>- VA Medication History</li> <li>- VA Pathology Report: Surgical Pathology/Cytology/Electron Microscopy. VA Pathology Reports are available 36 hours after they have been completed. Some studies done at a non-VA facility may not be available or they may not necessarily include an interpretation.</li> <li>- VA Problem List - Your VA Problem List contains active health problems your VA providers are helping you to manage. This information is available 36 hours after it has been entered. It may not contain active problems managed by non-VA health care providers.</li> <li>- VA Notes - VA Notes written from January 1, 2013 forward are available 36 hours after completion and signed by all required members of your VA health care team. Compensation and Pension exam notes will be available 30 calendar days after they are completed.</li> <li>- VA Radiology - Your report is available 36 hours after it has been verified by members of the VA health care team</li> <li>- VA Vitals and Readings</li> <li>- VA Wellness Reminders</li> <li>- VA electronic health record information such as VA Continuity of Care Document (VA CCD) and other information as it becomes available</li> <li>- Department of Defense (DoD) Military Service Information</li> </ul> <p>In addition you may be able to:</p> <ul style="list-style-type: none"> <li>- Use the VA Blue Button to view, save download and/or print your VA health and DoD Military Service Information. You can also share this with your caregiver, non-VA provider or others you trust.</li> <li>- Download your VA Continuity of Care Document (VA CCD). This is a standard electronic exchange document, used for sharing patient information. The VA CCD will be a summary of important health information from the Veterans VA Electronic Health Record.</li> <li>- Use Secure Messaging to communicate online with your VA health care team. You may send messages to request or cancel VA appointments. Use it to ask about lab results or find out about a medication or health issue. Or simply to discuss other general health matters.</li> </ul>

# Login.gov team

## Interview Objective

Understand the processes, roles, user experience, and challenges around setting up and accessing a login.gov account and the plan for the USPS pilot. In particular focusing on:

- USPS in-person proofing process
- Multi-factor authentication options and challenges
- Trusted referee options and process
- Defining access for users related to primary login.gov account holders
- Current thinking around inherited proofing from MHV

## Interviewees

### **Annie Hirshman**

Lead UX Designer

### **Ben Chait**

Product Manager

### **Chanan Delivuk**

Partner CX Coordinator for  
login.gov

### **Jeff Holden**

Product Manager on Partnerships  
Team

### **Princess Ojiaku**

Lead UX on Unsupervised Remote  
ID Workflow

*“There’s quite a bit [Veterans] have to do online before they can[...] go to the post office.”*

Annie Hirshman

*“Some users bounce as soon as they get to [the upload] screen. Some of the users will upload an image but never actually submit.”*

Ben Chait

# Login.gov - Key Takeaways

- One third of users abandon the process of creating a login.gov account, the two major drop-off points are the initial instructions and document upload
- The login.gov team does not have a good picture of the causes for failure for the document upload step, a major drop-off point in creating a login.gov account
- Low tech options are available or being explored for specific pain points in the online flow, but there is not a complete low tech or in-person option
- Trusted referee options could provide proof of identity for those who do not have approved ID or an address
- Security key are easy to use and provide the highest level of security but they are unfamiliar and require initial setup and thus the least used
- The MFA options that are most commonly selected (codes, SMS, face/touch) are those that can be done instantly, but are not universally accessible and can result in security issues

# Documentation: Non-Veteran User Roles

In-progress

Non-Veteran User Roles

Roles	Definition	Recognizing Organizations	Eligibility/Recognition	Access to Information	Credentialing Process	Documentation Required (for NIST)	Tasks	Prioritized Use Cases	Questions/ Considerations	Next Steps
Caregiver	<p><b>Caregiver</b> is a person who provides care for a veteran (long-term or short-term) who is unable to care for himself or herself. This role is typically a family member or friend.</p> <p><b>VA caregiver</b> is a person who provides care for a veteran (long-term or short-term) who is unable to care for himself or herself. This role is typically a family member or friend.</p> <p><b>VA caregiver</b> is a person who provides care for a veteran (long-term or short-term) who is unable to care for himself or herself. This role is typically a family member or friend.</p>	VHA	<p>Each VHA recognizes program for family members.</p> <p>Eligibility criteria includes:</p> <ul style="list-style-type: none"><li>VA caregiver must be a family member.</li><li>VA caregiver must be a family member.</li></ul> <p>Can get a VA caregiver account.</p>	<p>Access to VA health care services.</p> <p>Access to VA health care services.</p>	<p>Access to VA health care services.</p> <p>Access to VA health care services.</p>		<p>Access to VA health care services.</p> <p>Access to VA health care services.</p>	<p>VA caregiver can view health care services.</p> <p>VA caregiver can view health care services.</p>	<p>Access to VA health care services.</p> <p>Access to VA health care services.</p>	<p>Identify tasks &amp; corresponding access levels.</p> <p>Identify tasks &amp; corresponding access levels.</p>
Beneficiary	<p><b>Beneficiary</b> is a person who is entitled to receive benefits from the VA. This role is typically a family member or friend.</p> <p><b>VA beneficiary</b> is a person who is entitled to receive benefits from the VA. This role is typically a family member or friend.</p> <p><b>VA beneficiary</b> is a person who is entitled to receive benefits from the VA. This role is typically a family member or friend.</p>	VBA	<p>Each benefit has specific qualifications to determine eligibility.</p> <p>Can get a VA beneficiary account (if).</p>				<p>On VA.gov same as Veterans.</p>	<p>Same as above.</p>	<p>Access to VA health care services.</p> <p>Access to VA health care services.</p>	<p>Identify tasks &amp; corresponding access levels.</p> <p>Identify tasks &amp; corresponding access levels.</p>
Delegate	<p><b>Delegate</b> is a person who is authorized to act on behalf of a veteran. This role is typically a family member or friend.</p> <p><b>VA delegate</b> is a person who is authorized to act on behalf of a veteran. This role is typically a family member or friend.</p> <p><b>VA delegate</b> is a person who is authorized to act on behalf of a veteran. This role is typically a family member or friend.</p>	VBA	<p>Each benefit has specific qualifications to determine eligibility.</p> <p>Can get a VA delegate account (if).</p>	<p>Access to VA health care services.</p> <p>Access to VA health care services.</p>	<p>Access to VA health care services.</p> <p>Access to VA health care services.</p>		<p>Access to VA health care services.</p> <p>Access to VA health care services.</p>	<p>Access to VA health care services.</p> <p>Access to VA health care services.</p>	<p>Access to VA health care services.</p> <p>Access to VA health care services.</p>	<p>Identify tasks &amp; corresponding access levels.</p> <p>Identify tasks &amp; corresponding access levels.</p>
Other	<p><b>Other</b> is a person who is not a caregiver, beneficiary, or delegate. This role is typically a family member or friend.</p> <p><b>VA other</b> is a person who is not a caregiver, beneficiary, or delegate. This role is typically a family member or friend.</p> <p><b>VA other</b> is a person who is not a caregiver, beneficiary, or delegate. This role is typically a family member or friend.</p>								<p>Access to VA health care services.</p> <p>Access to VA health care services.</p>	<p>Identify tasks &amp; corresponding access levels.</p> <p>Identify tasks &amp; corresponding access levels.</p>



Identify tasks & corresponding access levels. Create standardized level names across non-veteran roles, determine which levels require NIST credentialing, leverage existing delegate processes and online interaction.

Source Key

VA Non-Veteran User Roles Research

Frog Thoughts

Frog Interviews

Online Secondary Research

1. MHV: Theresa M Hancock & Susan Haskins

2. login.gov

VA Non-Veteran User Roles Research

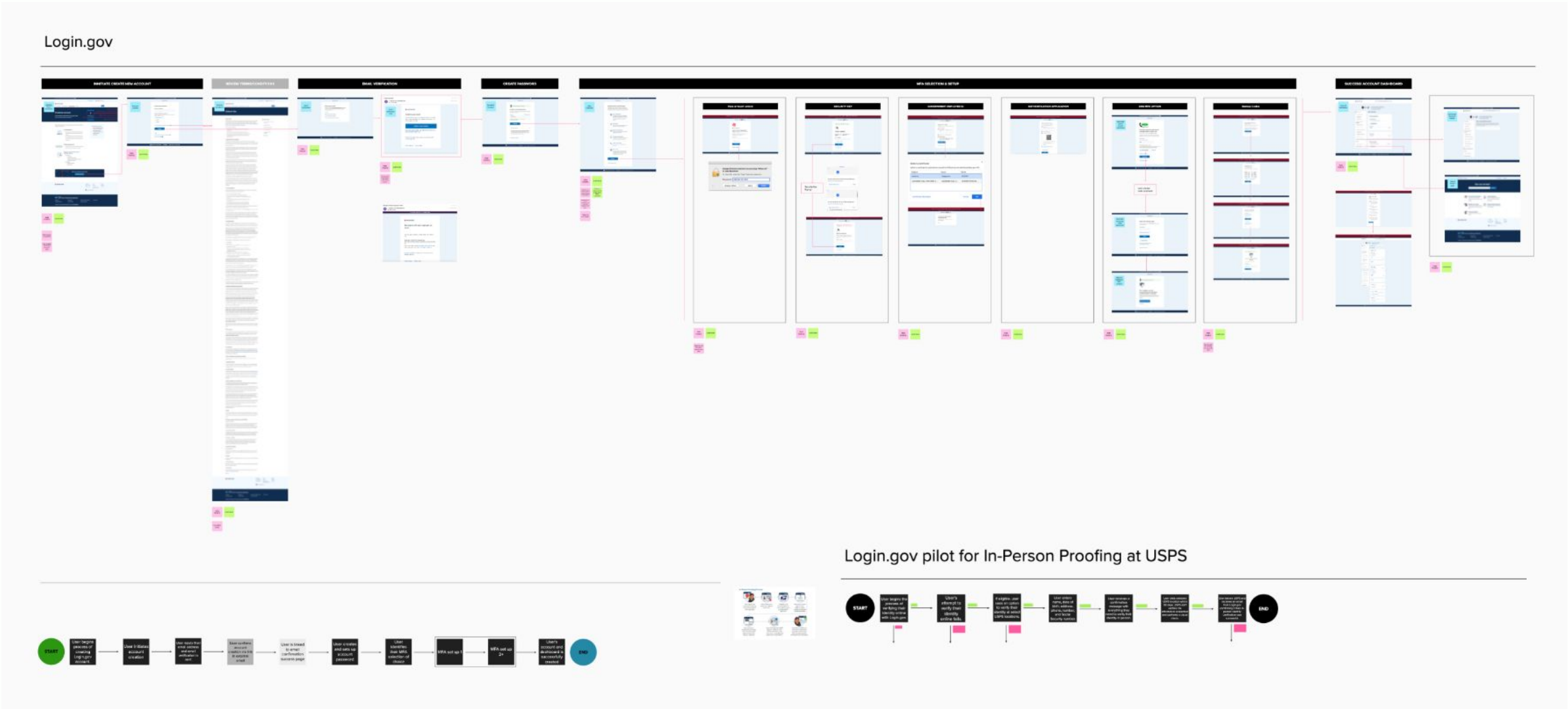
Frog Thoughts

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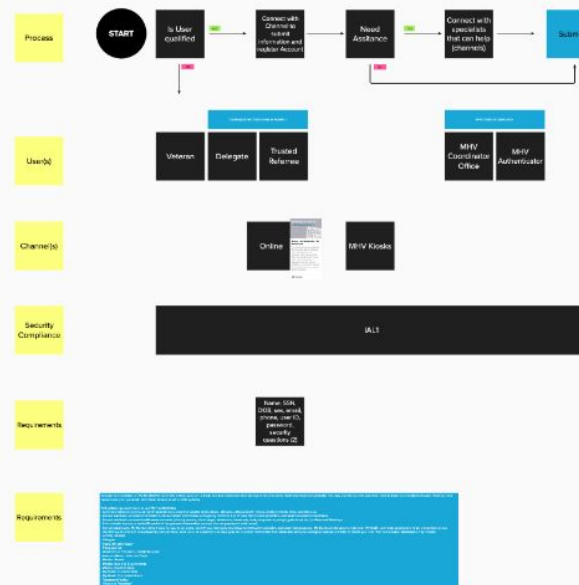


# Flows documented: Login.gov

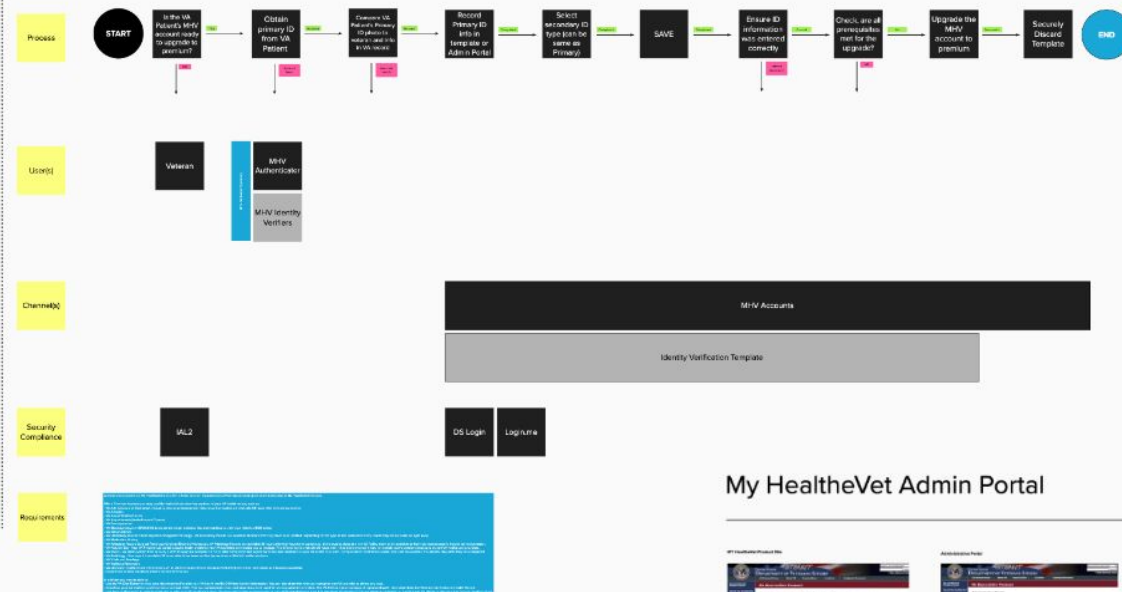


# Flows documented: My HealthVet

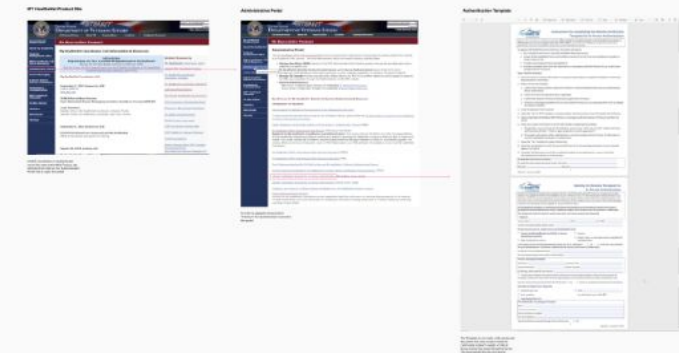
## My Healthe Vet Account Creation



## My Healthe Vet Upgrade to Premium



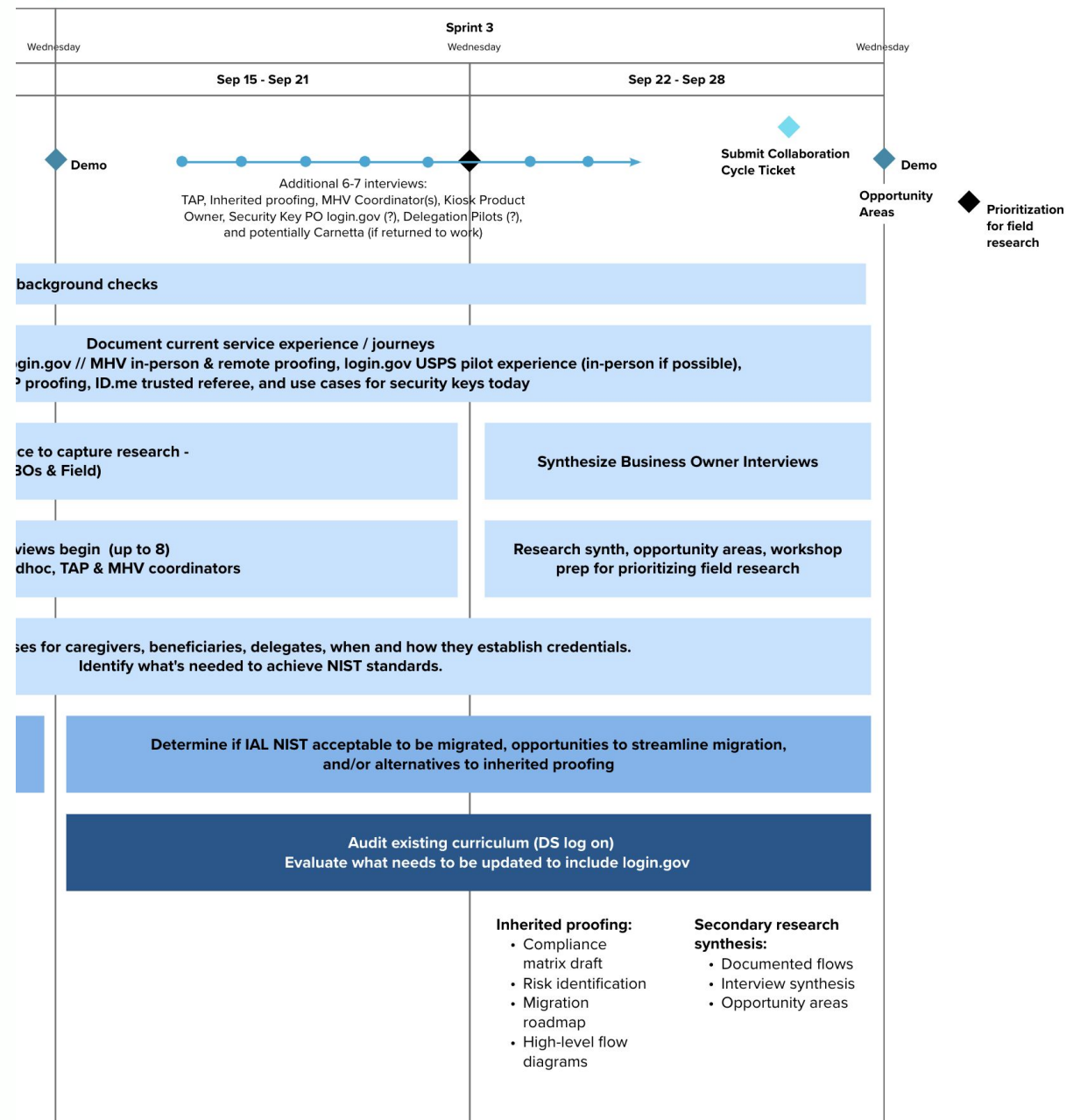
## My HealtheVet Admin Portal



# Next steps

# Sprint 3 goals

- e-QIP background checks
- VFS Platform orientation
- Collect follow up materials from interviews
- Upcoming interviews: Inherited Proofing, TAP (Melissa R. and Dr. Hill)
- Identify any additional business owners or SMEs related to focus areas, schedule interviews, prep conversation guides as needed
- Connect team with MHV coordinators, kiosk PO
- Identify opportunity areas for field research
- Collaboration Cycle:
  - Submit Collaboration Cycle Request
  - Prep Design Intent/Research Review
- Github + Zenhub set up



# Questions?

VA IDENTITY PRODUCT

# Appendix

# Materials received to-date

**APRIL 2022**

## Identity MHV Inherited Eligible Users Study readout

This research will inform design, content, and functionality changes needed to address any pain points within the flow of the inherited proofing process and to potentially uncover accessibility needs on VA.gov. **Recommendations:** Additional support for iOS/macOS, education for VA advocates & social workers, video-tutorials/FAQs.

**JAN 2022**

## Identity Sign-in Accessibility Study readout

To discover issues or pain points **when using a screen reader** (and other assistive technology) to login using the sign-in modal on VA.gov.

**Recommendations:** Reduce page content, improve navigation, find solution for Caregivers/Family to securely sign in w/o sharing PII, integrate assistive tech.

**NOV 2021**

## User Roles research findings

Three primary non-Veteran user groups: Beneficiaries, Caregivers, Delegates.

**Recommendation:** Conduct additional research to identify use cases, tasks, and outcomes for each of these non-Veteran user groups.

**OCT 2021**

## Identity VA.gov Sign In Modal readout

To understand how the addition of Login.gov and other design modifications to the VA.gov sign-in modal will impact a user's ability to sign in; understand what information Veterans, find the most important or least important in a sign in option; understand which type of credential provider would users prefer, given the choice of government-created or private sector. **Recommendation:** Look to simplify CSP buttons, share ranking attributes to guide communications around changes to providers

**SEPT 2021**

## Identity Authentication Discovery readout

To understand the potential impact of sunseting providers such as MHV and DS Logon. **Recommendation:** Use sentiment around other providers and account creation process to build case Login.gov is most secure provider

**DEC 2015**

## Credentials Final Readout Master No PII

To understand how users currently log in to VA.gov and why they use one credential over the other (MHV, DS Logon, and ID.Me)

# Materials received to-date

AUG 2022

## LE Project Discovery Report, Priority Life Experiences

Research conducted to better-understand the physical, mental, and emotional needs of Transitioning Service Members (TSMs), Recently Separated Veterans (RSVs), and their families during Military to Civilian (M2C) transition.

Associated deliverables:

2022

## Transition Journey Map

This journey map depicts the Service member experience navigating military to civilian transition, and the impact of activities and events within that journey on their future.

2022

## Transition Personas

To discover issues or pain points **when using a screen reader** (and other assistive technology) to login using the sign-in modal on VA.gov.

**Recommendations:** Reduce page content, improve navigation, find solution for Caregivers/Family to securely sign in w/o sharing PII, integrate assistive tech.

SEPT 2022

## In-Person Proofing Pamphlet for TMF Partners.pdf

Login.gov overview of the upcoming pilot for in-person proofing, in partnership with USPS. The partnership leverages USPS's current informed delivery workflow and existing infrastructure.



# Additional documentation found

2022

## MHV Authenticator Role Training - via TMS

Roles and responsibilities of a MHV Authenticator, including the role of an Identity Verifier. Process to upgrade a MHV account to Premium (In Person an Online).

APRIL 2021

## MHV Identity Verification - VHA Directive 1907.02

This Veterans Health Administration (VHA) directive establishes mandatory standards for verifying the identity of a Veteran or others (e.g., delegates, guardians, personal representatives) requesting a My HealtheVet (MHV) Premium account for the highest level of access to individually-identifiable health information (IIHI) within MHV. This verification process includes responsibilities for Department of Veterans Affairs (VA) medical facility MHV Coordinators or other staff assigned to perform identity verification.

May 2022

## MHV Proofing Interface

This solution will enable veterans who have already completed the MHV in person verification process to automatically transition their verification information over to a login.gov account.

2022

## OIT Vision 2022

Assistant Secretary for Information and Technology and Chief Technology Officer Kurt DelBene defines his vision for the future of OIT.

2022

## MHV Upgrade to Premium - via MyHealth.gov

Dedicated public website dedicated to educating users on the benefits of Premium and how to upgrade.