Sprint 5 Demo

Tuesday, April 5th, 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
Scrum Master

ENGINEERING

Teagan Stephenson
Ft. Lauderdale, FL
Backend Engineer

DESIGN

Kit Casey
Boston, MA
Design Director

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

Grace Hong
New Jersey
Experience
Designer

James Lewis
Austin, TX
Accessibility and
UX Research Lead

Executive team

Jeff Scheire
MO Studio

Marcy Jacobs
McKinsey

Kevin London
Frog

Will Reynolds
SERVE

Ben Morris
Pluribus
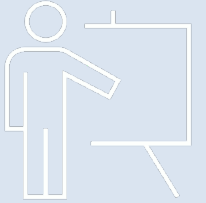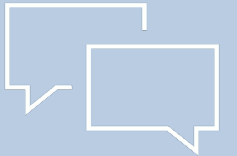
Travis Hoffmann
MO Studio

WELCOME TO THE SPRINT 5 DEMO

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:

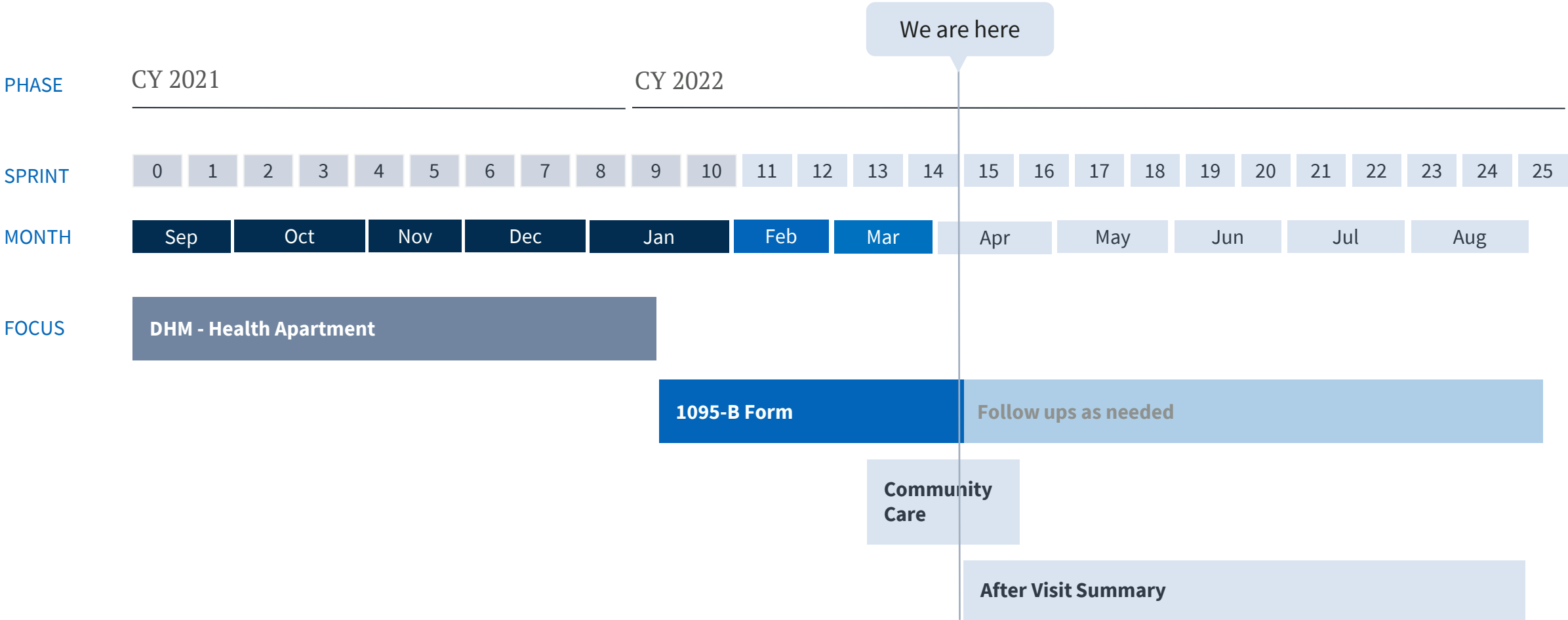**1** To demo the accomplishments or functionality that was built over the past sprint

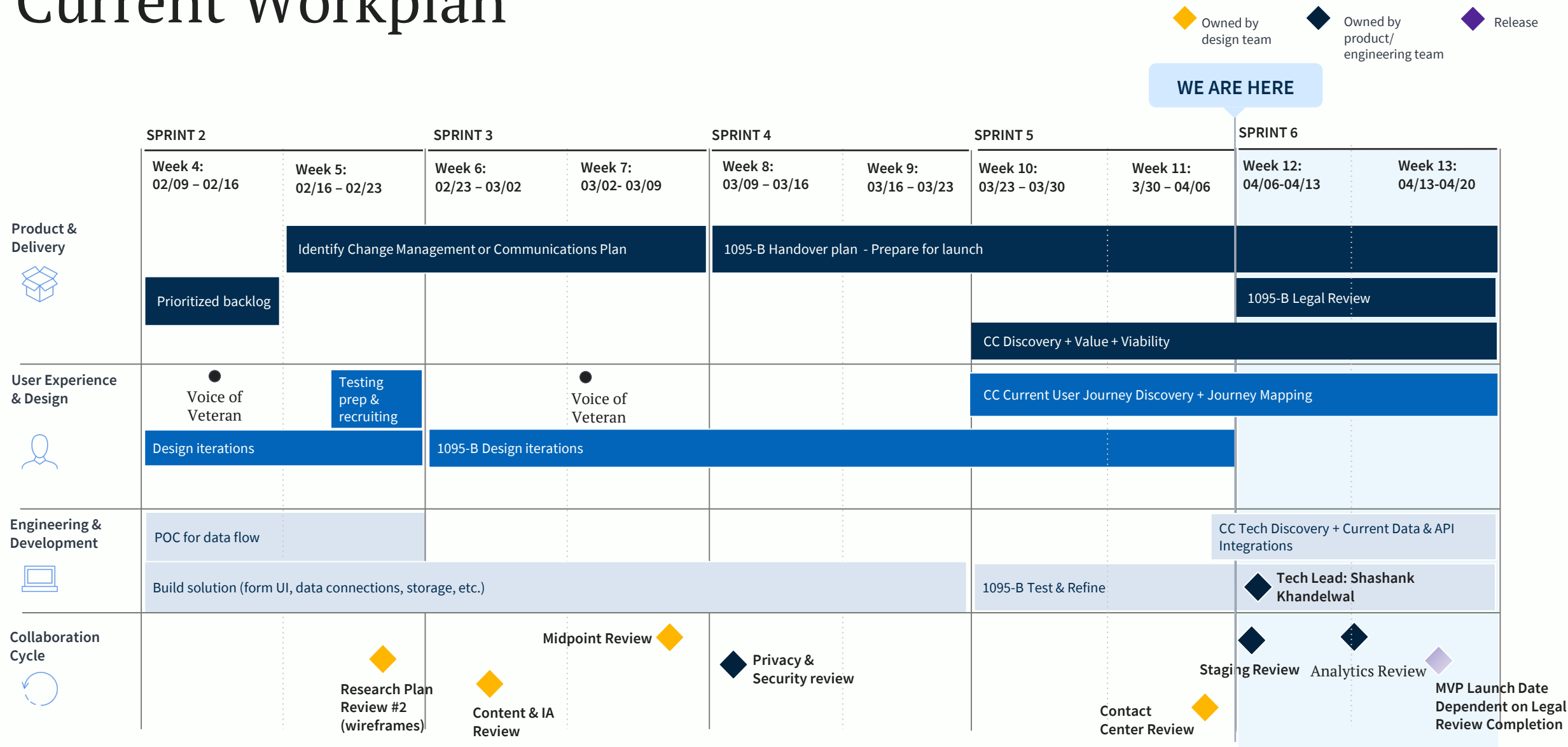**2** To get feedback and insights early and often

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

Roadmap overview

We are here

	CY 2021									CY 2022																

PHASE

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

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

FOCUS

DHM - Health Apartment

1095-B Form | Follow ups as needed

Community Care

After Visit Summary

Current Workplan

WE ARE HERE

	SPRINT 2		SPRINT 3		SPRINT 4		SPRINT 5		SPRINT 6	
	Week 4: 02/09 – 02/16	Week 5: 02/16 – 02/23	Week 6: 02/23 – 03/02	Week 7: 03/02- 03/09	Week 8: 03/09 – 03/16	Week 9: 03/16 – 03/23	Week 10: 03/23 – 03/30	Week 11: 3/30 – 04/06	Week 12: 04/06-04/13	Week 13: 04/13-04/20
Product & Delivery		Identify Change Management or Communications Plan			1095-B Handover plan - Prepare for launch					
	Prioritized backlog								1095-B Legal Review	
							CC Discovery + Value + Viability			
User Experience & Design	● Voice of Veteran	Testing prep & recruiting	● Voice of Veteran				CC Current User Journey Discovery + Journey Mapping			
	Design iterations		1095-B Design iterations							
Engineering & Development	POC for data flow								CC Tech Discovery + Current Data & API Integrations	
	Build solution (form UI, data connections, storage, etc.)						1095-B Test & Refine		◆ **Tech Lead: Shashank Khandelwal**	
Collaboration Cycle				Midpoint Review ◆	Privacy & Security review				◆ Staging Review ◆ Analytics Review	◆
		◆ Research Plan Review #2 (wireframes)	◆ Content & IA Review						Contact Center Review ◆	**MVP Launch Date Dependent on Legal Review Completion**

*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

Preview of Sprint 6   5

Agenda

Sprint Goal: For sprint 5 we focused on getting our product into staging and began our discovery on Community Care.

1 DESIGN

A. Updated 1095-B product guides and video for Contact Center Review and HEC

B. Draft, notification templates for 1095-B Opt-in

C. Finalized 1095-B content changes & error states with Sitewide Content team

D. CC: User journey discovery

E. CC: Draft journey map

2 TECH

A. Built end to end flow to download a PDF

B. Revised code to ensure privacy specifications given by backend team

C. CC: Investigate VAOS data connections

D. CC: High level investigation into eligibility API

3 PRODUCT

A. Investigated how to make our PDF accessible

B. Coordinate remaining collaboration cycle reviews

C. Investigate with Profiles team and HEC to understand how opt in process may be built

D. CC: Coordinate and manage tech discovery

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.

1095-B Overview

Project objectives

Digitize 1095-B form on VA.gov so Veterans can easily access the form and download the form for their records.
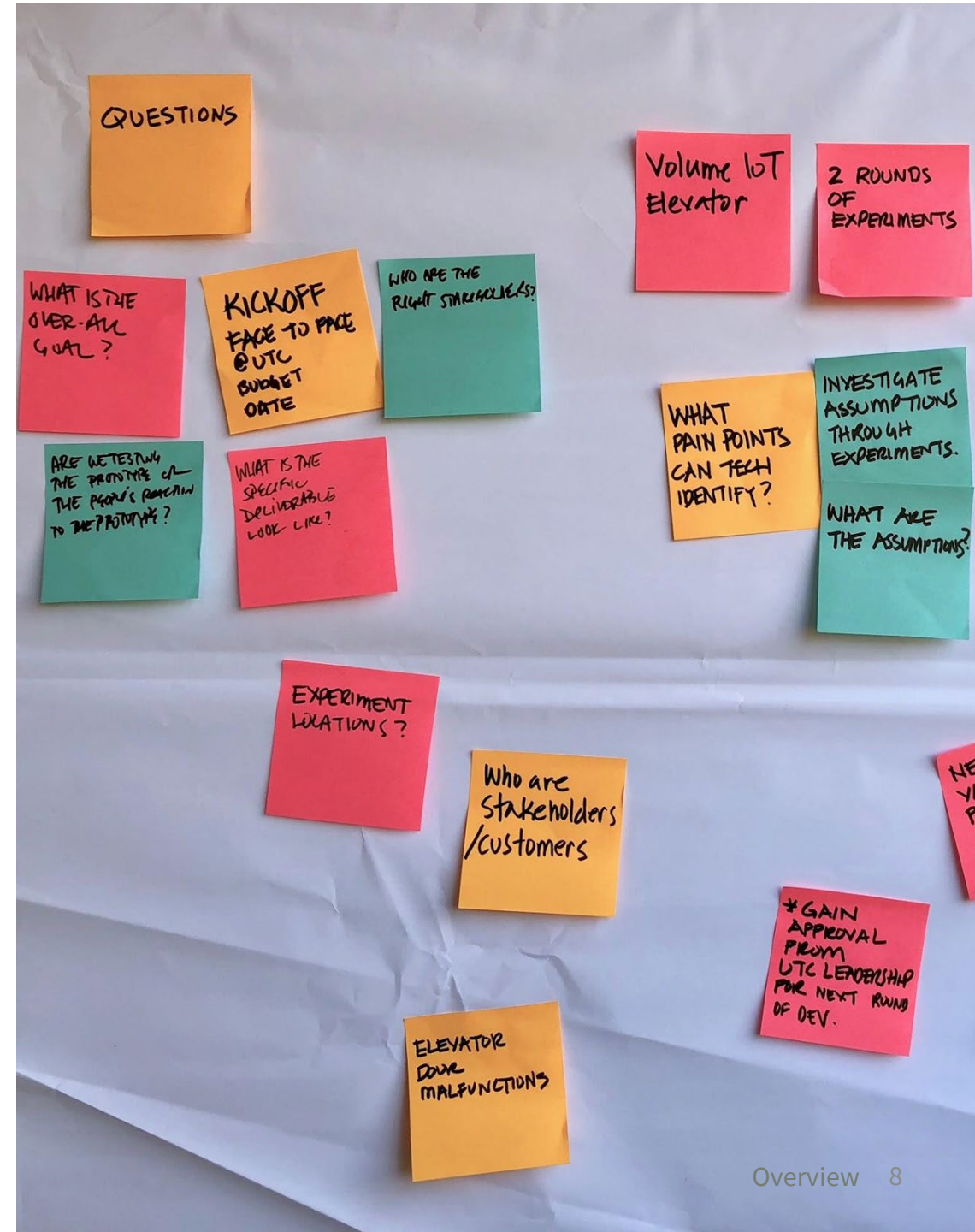
We presented our finished product and informational materials to our business owner at the Health Enrollment Center

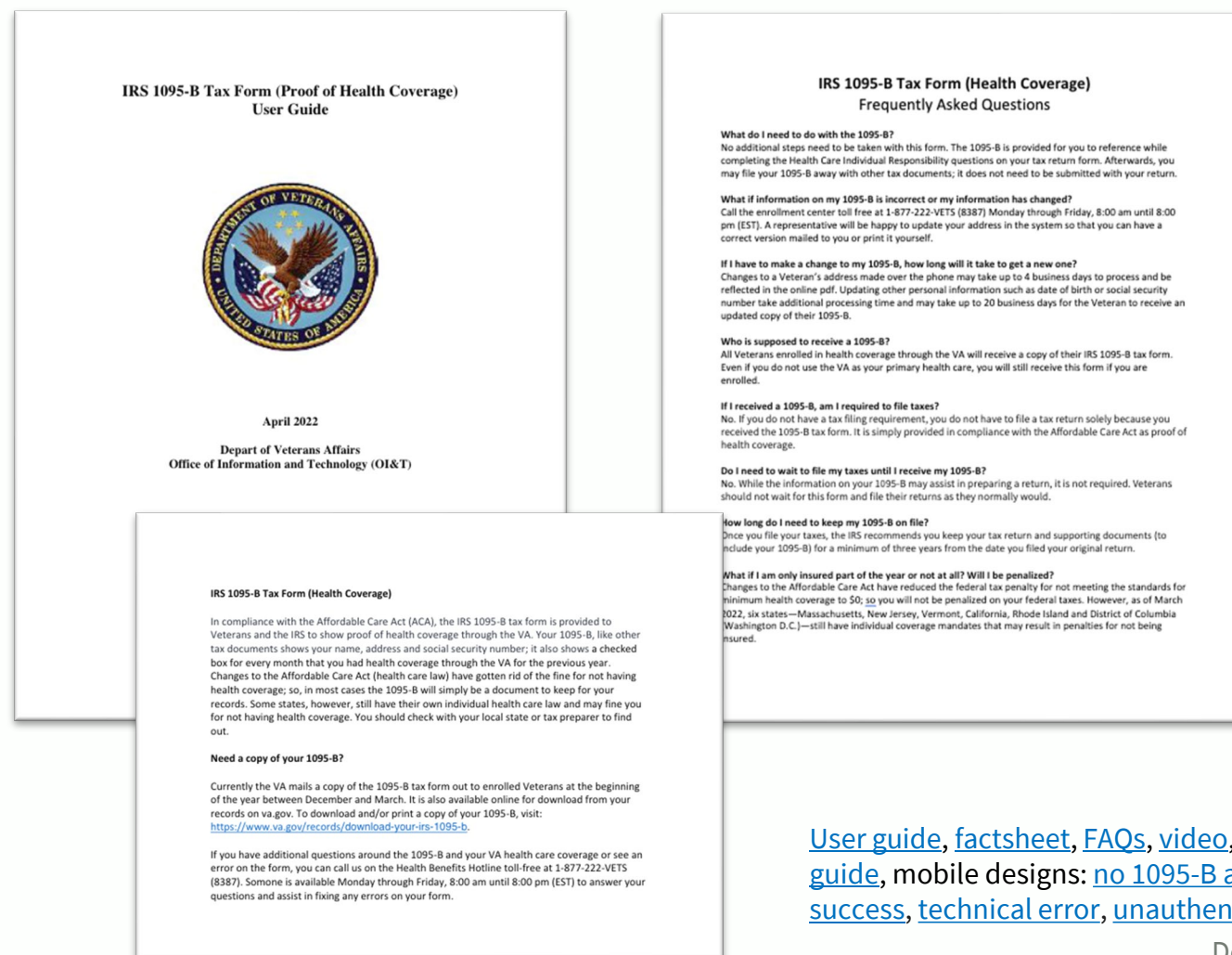[User Story](): Update HEC documents to reflect changes from sitewide

[User Story](): Update product guide to reflect changes from sitewide content review

[User Story](): Iterate on designs from Business Owner feedback (round 2)

[User Story](): Transmit final draft of HEC documents to Tarsha

[User Story](): Update HEC products based on business owner feedback (final version)

[User Story](): Create video walk through of final designs for HEC

[User guide](), [factsheet](), [FAQs](), [video](), [product guide](), mobile designs: [no 1095-B avail](), [success](), [technical error](), [unauthenticated]()

We prepared the VA call center to answer questions about our product

[User Story](): Collaboration cycle: Contact center review
[User Story](): Update call center product video to reflect changes from sitewide content

- New product video delivered to Jason Woodman and Steven Tarlow on April 1

- All Contact Center review deliverables are with the Jason and Steven, and we're awaiting feedback
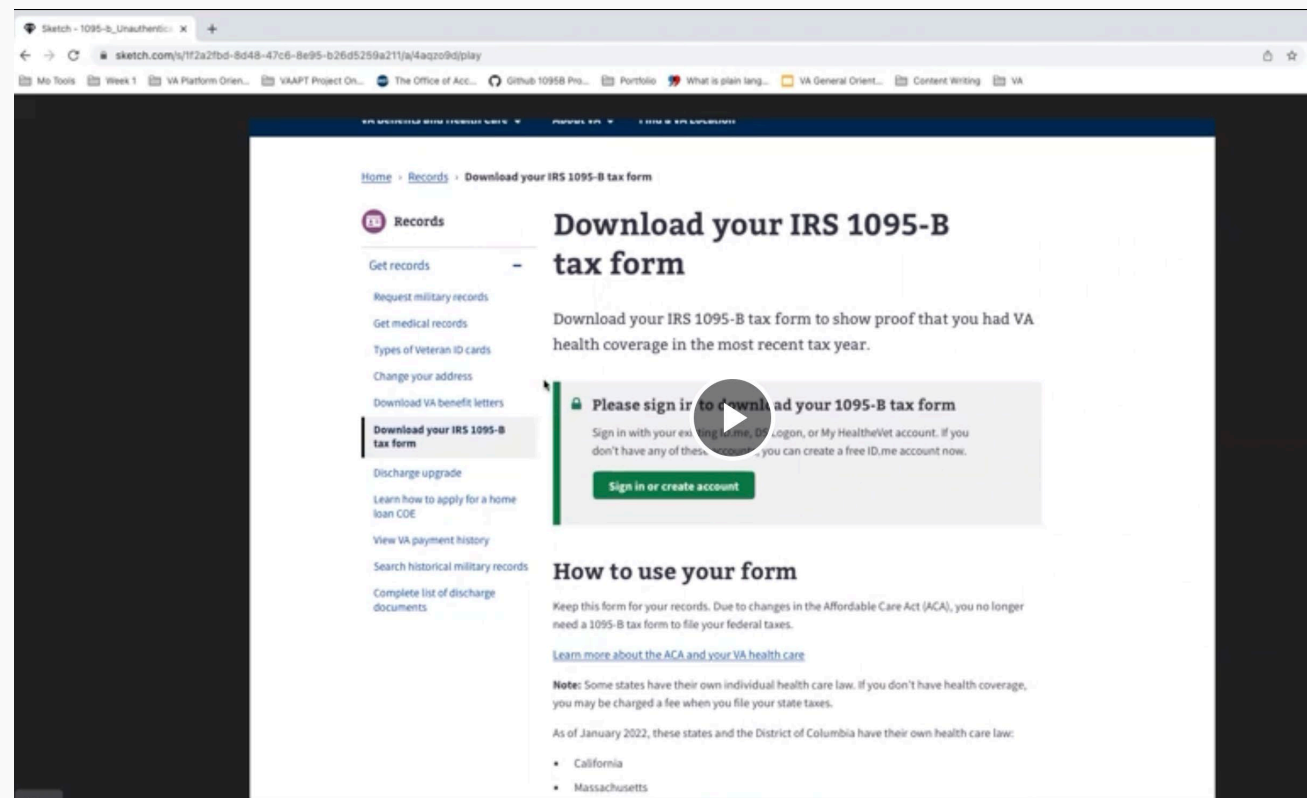
[video]() & [ticket]()

We completed product build in anticipation of entering staging review on April 8

<u>User Story</u>: Update model for encryption
<u>User Story</u>: Update AWS script
<u>User Story</u>: Front end testing
<u>User Story</u>: Building out front end for error states
<u>User Story</u>: Collaboration cycle: Staging review

- Model and encryption and AWS scripts done
  - Tests need to be written for these

- Front End error states are completed and merged
  - Alternative forms of testing approved by collaboration cycle PM

- Staging review on Friday April 8
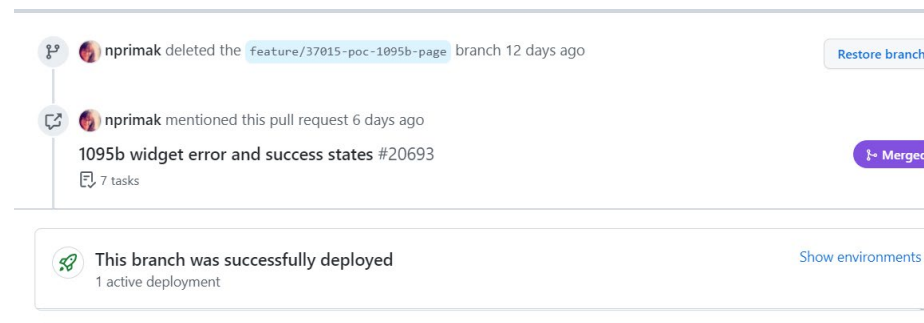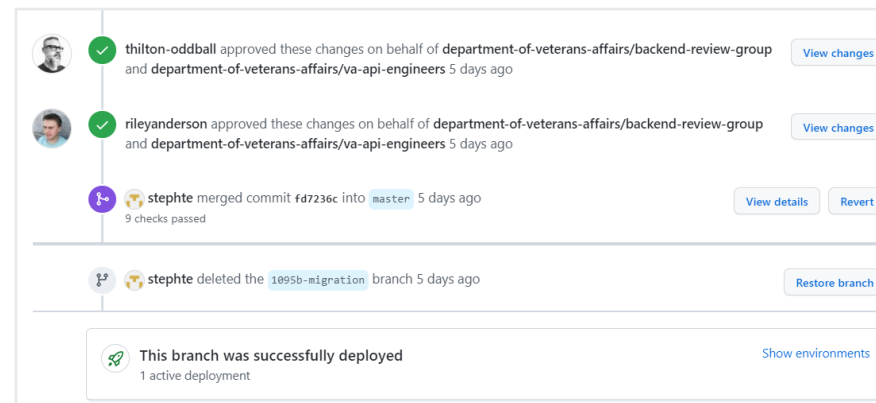
Ticket #G<u>9457</u>, <u>9423</u>, <u>9430</u>, <u>20693</u>, <u>20619</u>

We tested for accessibility compliance and created a path for future improvements

[User Story](): Explore options in fixing language parameters on PDF
[User Story](): 1095-B Team Staging Review Accessibility Checklist
[User Story](): Aligned on path forward regarding PDF accessibility
[User Story](): Draft notice to VA Accessibility Office regarding product non-compliance

- The IRS created a new 1095-B PDF that passed all but one Adobe accessibility test (Table Regularity)

- When we populate it with data and create a new file, we get several new errors
  - Primary language
  - Title
  - Tab order
  - Tagged form fields
  - Regularity

- We have submitted the PDF for a 508 audit, with details of our efforts, to the VA's 508 office, in hopes they can give further guidance

[Testing](), [prestaging tests](), [platform guidance]() & [your IT ticket]()

We laid the groundwork for opting into digital delivery and helped start the process for Profile to build opt in

User Story: Submit intake forms for VA Profiles (opt-in)
User Story: Draft email for opt-in notification requirements
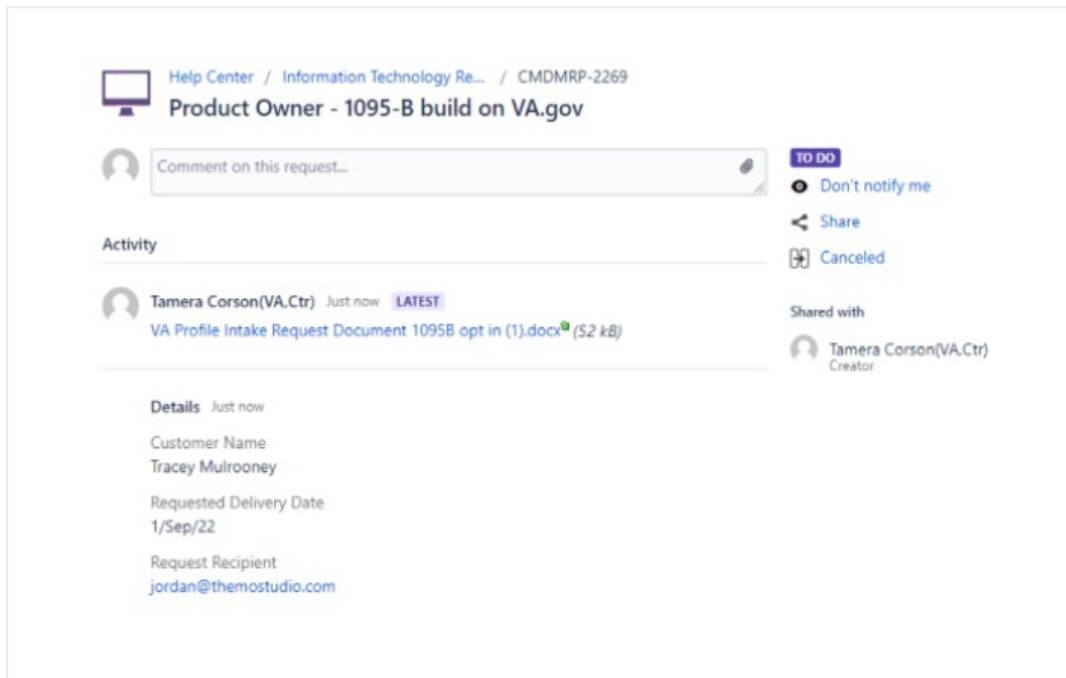
From: U.S. Department of Veteran Affairs

Subject: Your IRS 1095-B tax form is now available online

Dear [First_Name],

In an effort to reduce paper and provide more convenient options for Veterans to access documents, we have now made the IRS 1095-B tax form (proof of health coverage) available online. Visit https://www.va.gov/records/download-your-irs-1095-b to download and/or print a copy of this form for your records.

Go Paperless. If you would like to opt-in to paperless delivery and no longer receive your 1095-B in the mail, please update your notification preferences in your profile at: https://va.gov/profile/notifications

Thank you,

VA.gov

Draft opt-in templates, ticket & update 4/4

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 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
Frontend re-design by sitewide content team	Danielle Theirry, Sitewide Content Team	▪ Sitewide Content has redesigned our front-end designs when building it in Drupal to comply with Drupal standards ▪ 1095-B team to handoff the download button in widget to Sitewide content, then Sitewide content team will pull in the widget to the front end and own the full front end ▪ Sitewide Content to own and manage any changes on the front end as part of their timeline ▪ Sitewide Content to define launch date, since they own front end	Sprint 4 – 3/15/22	🟢	Team passed the following Collaboration Cycle milestones, with our version of designs: ▪ Midpoint Review on 3/04/22 ▪ Content & IA Review on 3/09/22 (finalized URL)
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 escalating to 508 office for additional guidance

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	March – end of Sprint 5	Product complete in staging
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	March – April	Product must be complete in staging
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 – April	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	April 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	April 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

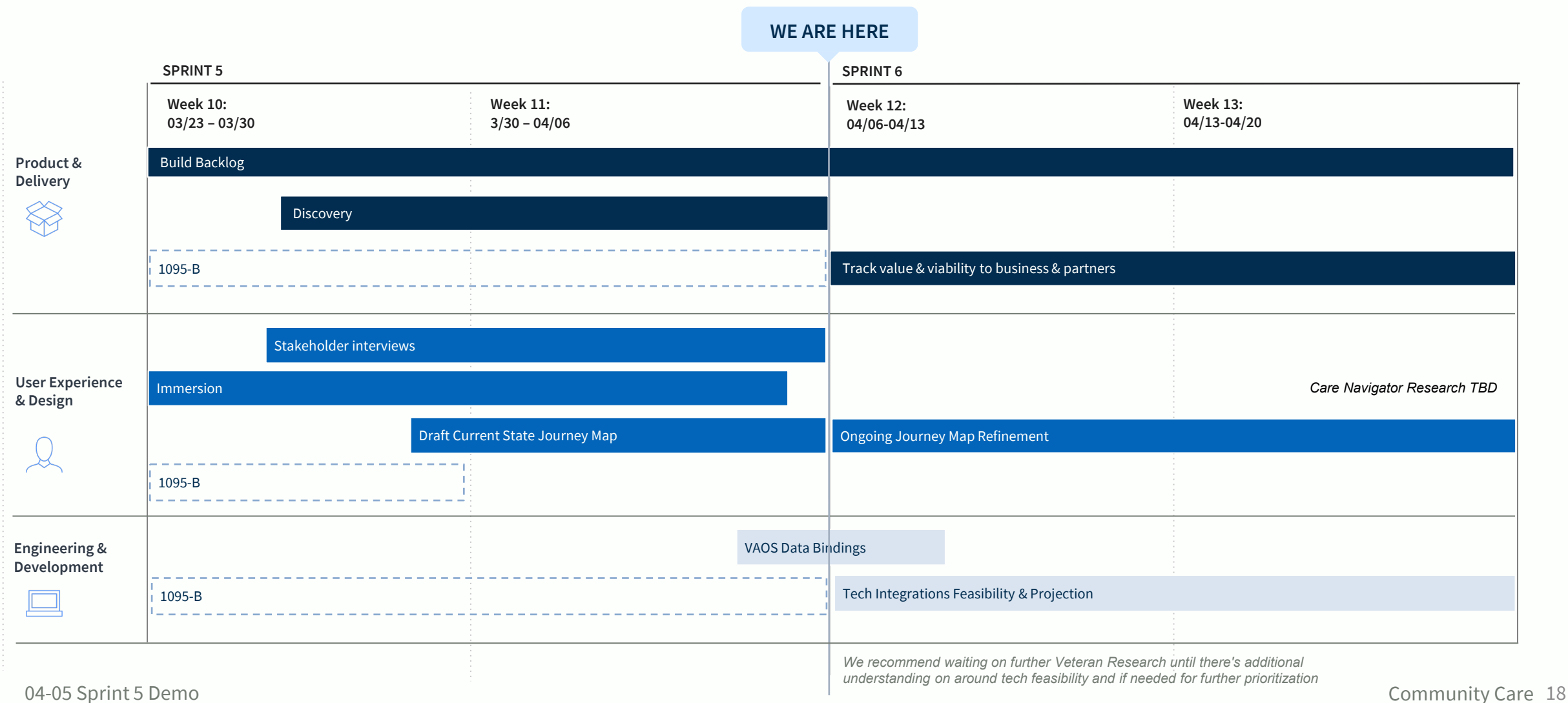SPRINT 5 DEMO

Community Care

Project objectives

- Draft a current state Journey Map to enable identification of impactful, near-term opportunities for integrating Community Care into VA.gov

- Focus areas:
  - Secure messaging
  - Medical records
  - Prescriptions
  - Debt/Billing

- Conduct product and tech discovery to assess complexity, scope, & feasibility
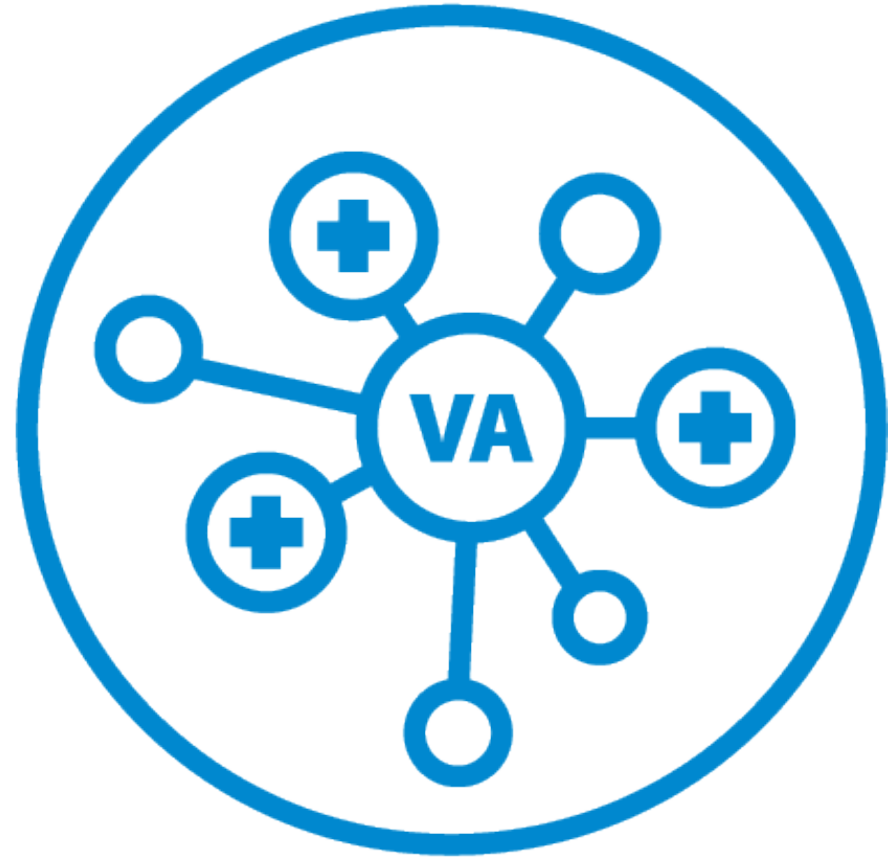
We laid out the potential deliverables into a workplan to show where we could help, given current timelines

WE ARE HERE

	SPRINT 5		SPRINT 6	
	Week 10: 03/23 – 03/30	**Week 11:** 3/30 – 04/06	**Week 12:** 04/06-04/13	**Week 13:** 04/13-04/20

Product & Delivery

- Build Backlog
- Discovery
- 1095-B
- Track value & viability to business & partners

User Experience & Design

- Stakeholder interviews
- Immersion
- Draft Current State Journey Map
- Ongoing Journey Map Refinement
- *Care Navigator Research TBD*
- 1095-B

Engineering & Development

- VAOS Data Bindings
- 1095-B
- Tech Integrations Feasibility & Projection

We recommend waiting on further Veteran Research until there's additional understanding on around tech feasibility and if needed for further prioritization

We assessed what should go into a plan to develop a solution for Community Care

Understand

- Synthesized themes from research
- Current state user journey map
- Veteran pain points
- Technology research on existing landscape

Envision the Future

- Ideation for potential future state near-term solutions
- Refined user journey map, illustrate future state with near-term solutions
- Tech potential architecture for future state, with dependencies
- Open questions still to be answered

Plan for future

- Prioritized future state solutions
- Phased roadmap (now, next, later) - aligning on MVP
- Epics and user stories

We conducted business partner interviews and synthesized themes we heard

User Story: CC: Conduct product discovery through business partner interview(s) to pull insights

- There are *many* disparate systems (40-43), which makes it hard to get reliable data (and/or sync data)

- There are *many* steps in the process to receive CC; some parts can be done online, while others are manual
  - Trickle down to Veteran users, causing frustration and pain points, *i.e., "why should go online if I still have to call or wait for a call from someone?"*
  - Leads to high abandonment rates
  - Many Veterans lack general awareness of the benefit and/or don't fully utilize it

- Not enough transparency into the billing process contributes to knowledge gaps for Veterans
  - A major pain point is understanding how co-pays & billing work as well as comprehension of the statement
  - There's a lot of information on CC & co-pays, but it's hard to find and not written clearly
  - Billing and Debt consolidation may have some MVP's that more readily reveal themselves (VA technical guidance)

- **The Veteran is the integrator**: Understanding/getting records to and from CC and VA doctors is a pain point for both Veterans as well as providers

- Prescriptions are a persistent pain point: tracking holistically, filling at the VA or externally (e.g., Walgreens), and ensuring benefit coverage of CC prescribed medications; early VA technical guidance advises against starting with this product feature since the outbound capability is in flux with EMR (chasing the wind) and the program office has a lot of work to also figure out how to be compliant (state-to-state especially) on prescription tracking

- There's drastic **drop-off rate after Veterans are referred** (12 million Veterans have been referred since March 2019, but only 3 million Veterans have completed CC); About 5,000 referrals have occurred over the last 12 months*
  Business owner interview with Alysse Mengason – Communications, Office of Community Care

# We synthesized what we learned into a draft of a journey map

[User Story](#): CC: Conduct initial product discovery through review of current MHV work product and past documentation
[User Story](#): CC: Conduct product discovery through business partner interview(s) to pull insights

Daniel T (Taliaferro, Trent D.): *"You've chosen one of the most integrated and complicated programs within health to look at."*


Draft: Community Care journey map

[Mural](#)
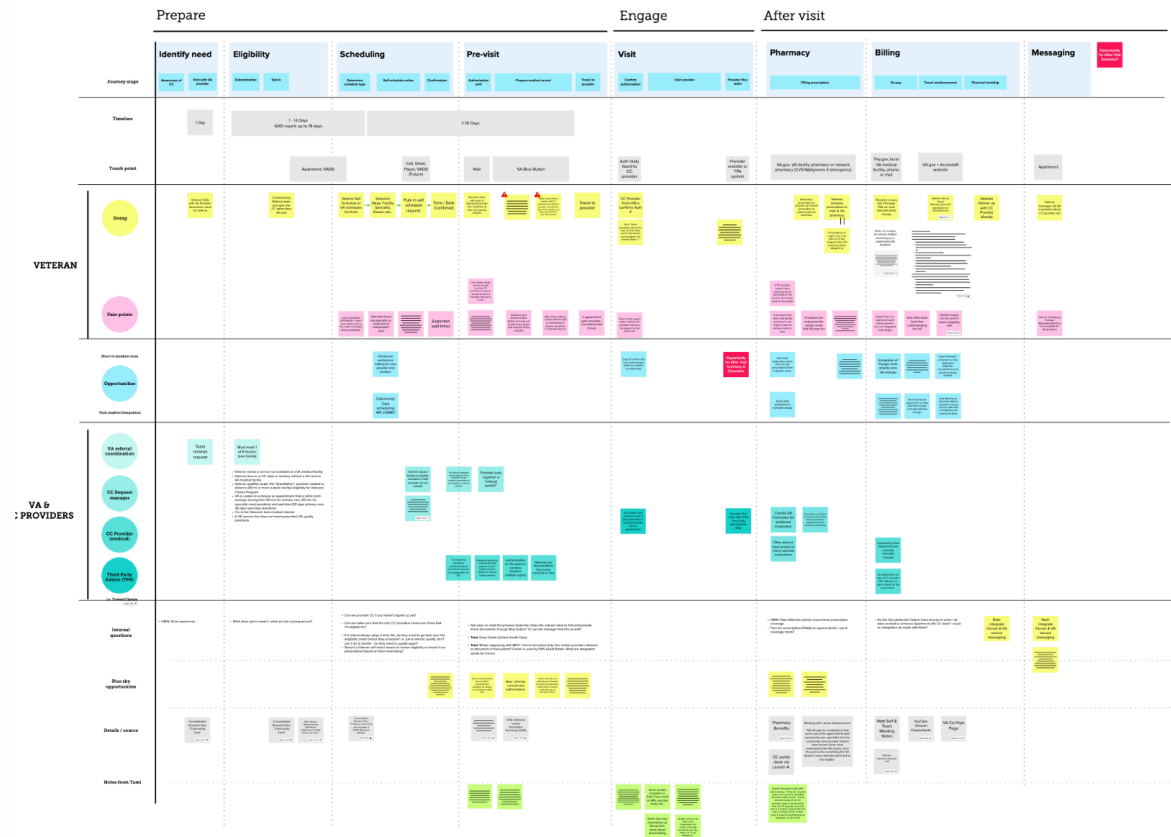
We are conducting technical discovery to get a baseline understanding of systems involved in community care

User Story: CC: Conduct initial product discovery through review of current MHV work products
User Story: CC: Conduct initial discovery into APIs
User Story: CC: Conduct initial discovery into data sources used in the health apartment

- CC Eligibility API
    - Drive times only
    - ~~Appointment wait times~~
    - ~~Best Medical Interest~~
    - ~~Quality Standards~~
- Need to confirm other related APIs
- Health Apartment data sources used
- Health Apartment Features List
- Next Steps:
    - George Brittingham: Overview of CC APIs & Architecture

CC IA
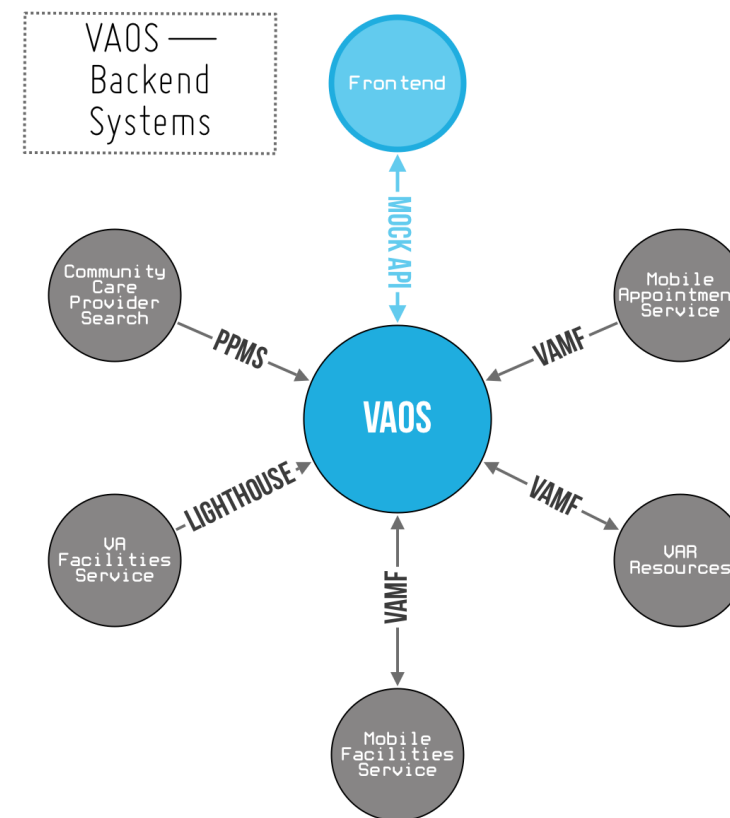
SPRINT 5 DEMO

Sprint Deliverables

Sprint 5 Deliverables 1095-B (1 of 4)

EPIC	STORY	ESTIMATE	ASSIGNED	OUTPUT	REVIEWED WITH VA-PO	SPRINT TEAM GOAL COMPLETED?
Design	#39042 Update HEC documents to reflect changes from sitewide	2	Carl	▪ FAQs ▪ User guide ▪ Factsheet	03/25/22	✓
Design	#38708 Update product guide to reflect changes from sitewide content review	2	Carl	▪ Product guide (revised)	03/25/22	✓
Design	#38038 Iterate on designs from business owner feedback (round 2)	1	Grace	▪ Mobile, no 1095-B avail ▪ Mobile, success ▪ Mobile, tech error in download ▪ Mobile, unauthenticated	03/29/22	✓
Design	#38902 Transmit final draft of HEC documents to Tarsha	1	Carl Jordan	▪ FAQs ▪ User guide ▪ Factsheet	03/15/22	✓
Design	#39275 Update HEC products based on business owner feedback (final version)	2	Carl	▪ FAQs ▪ User guide ▪ Factsheet	04/05/22	✓
Design	#39172 Create video walk through of final designs for HEC	2	Carl James	▪ HEC Video presentation	04/05/22	✓
Design	#38392 Collaboration cycle: Contact center review [1095-B]	0	Carl Jordan	▪ Product video (revised) ▪ Ticket	04/05/22	✓
Design	#38709 Update call center product video to reflect changes from sitewide content	2	Carl	▪ Video	03/25/22	✓
Design	#39446 Draft email for opt-in notification requirements	3	Carl	▪ Draft, opt-in notification templates	04/01/22	✓

Sprint 5 Deliverables 1095-B (2 of 4)

EPIC	STORY	ESTIMATE	ASSIGNED	OUTPUT	REVIEWED WITH VA-PO	SPRINT TEAM GOAL COMPLETED?
Tech	#39227 Update model for encryption	2	Teagan	▪ Ticket #G9457 ▪ Ticket #G9423 ▪ Ticket #G9430	04/05/22	✓
Tech	#39226 Update AWS script	3	Teagan	▪ Ticket #G9457 ▪ Ticket #G9423 ▪ Ticket #G9430	04/05/22	✓
Tech	#38097 Front end testing	5	Nadya	▪ Ticket #G20619 ▪ Ticket #G20693	04/05/22	✓
Tech	#39290 Building out front end for error states	5	Teagan	▪ Ticket #G20619 ▪ Ticket #G20693	04/05/22	✓
Tech	#38267 Explore options in fixing language parameters on PDF	5	Teagan Nadya	▪ Testing ▪ your IT ticket	03/29/22	✓
Tech	#38387 1095-B Team staging review accessibility checklist	3	James Jordan Nadya Teagan	▪ Ticket	04/05/22	✓

Sprint 5 Deliverables 1095-B (3 of 4)

EPIC	STORY	ESTIMATE	ASSIGNED	OUTPUT	REVIEWED WITH VA-PO	SPRINT TEAM GOAL COMPLETED?
PM	#38903 Aligned on path forward regarding PDF accessibility	0	Jordan	▪ Testing ▪ Platform guidance ▪ Ticket	03/29/22	✓
PM	#39304 Draft notice to VA Accessibility Office regarding product non-compliance	2	Tami Jordan	▪ Ticket	04/01/22	✓
PM	#38039 Understand what is needed for legal review and impact to timeline	1	Munish	▪ NR	03/25/22	✓
PM	#39020 Submit intake forms for Profiles and HEC	2	Tami Jordan	▪ Ticket ▪ Update 4/4	04/01/22	✓

Sprint 5 Deliverables – CC

EPIC	STORY	ESTIMATE	ASSIGNED	OUTPUT	REVIEWED WITH VA-PO	SPRINT TEAM GOAL COMPLETED?
Design	[#39072 CC: Conduct initial product discovery through review of current MHV work product and past documentation](#)	5	James Carl	▪ [Journey Map](#)	04/05/22	✓
Design	[#39071 CC: Conduct product discovery through business partner interview(s)to pull insights](#)	8	James Jordan Kit	▪ Insights; p. 20 of Demo Deck ▪ [Journey Map](#)	04/05/22	✓
Tech	[#39176 CC: Conduct initial discovery into data sources used in the health apartment](#)	5	Munish Jordan Teagan	▪ [CC IA](#)	04/05/22	✓
Tech	[#39177 CC: Conduct initial discovery into API's](#)	5	Munish Jordan Teagan	▪ [CC IA](#)	04/05/22	✓

SPRINT 5 DEMO

Preview of Sprint 6

Sprint 6 will focus on

Next sprint demo: **April 19**

Stories subject to change during Sprint planning

1 PRODUCT
- A. 1095-B: UAT
- B. 1095-B: Opt-In follow up
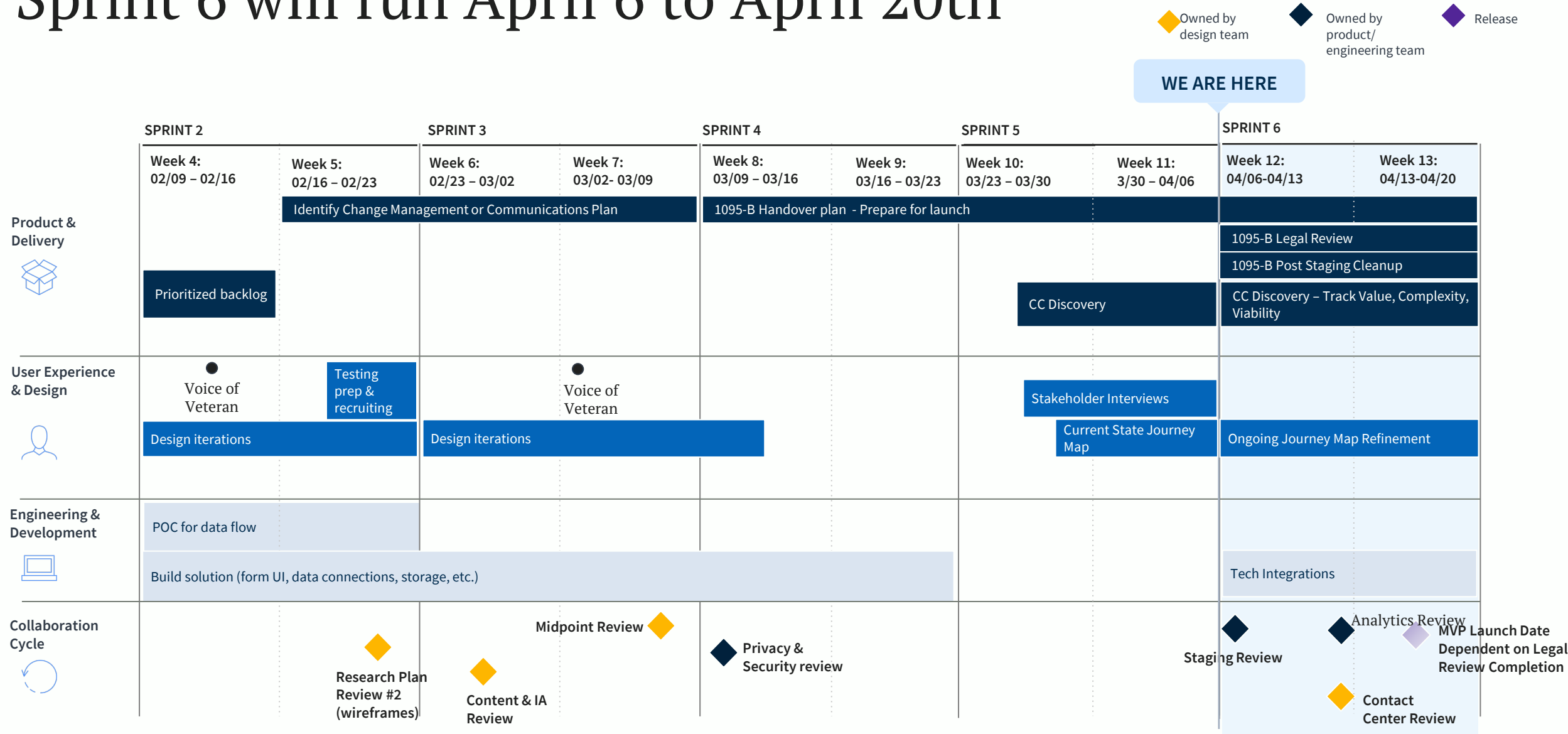- C. CC: Product discovery to assess complexity, value and viability
- D. CC: Identify MVP

2 DESIGN
- A. CC: High Fidelity Journey Map
- B. CC: Phased design roadmap

3 TECH
- A. 1095-B: Post Staging refinements & UAT
- B. CC: Tech discovery to assess complexity and feasibility
- C. CC: Current state high level architecture
- D. CC: Phased tech roadmap

Sprint 6 will run April 6 to April 20th

WE ARE HERE

	SPRINT 2		SPRINT 3		SPRINT 4		SPRINT 5		SPRINT 6	
	Week 4: 02/09 – 02/16	Week 5: 02/16 – 02/23	Week 6: 02/23 – 03/02	Week 7: 03/02- 03/09	Week 8: 03/09 – 03/16	Week 9: 03/16 – 03/23	Week 10: 03/23 – 03/30	Week 11: 3/30 – 04/06	Week 12: 04/06-04/13	Week 13: 04/13-04/20
Product & Delivery		Identify Change Management or Communications Plan			1095-B Handover plan - Prepare for launch					
									1095-B Legal Review	
									1095-B Post Staging Cleanup	
	Prioritized backlog						CC Discovery		CC Discovery – Track Value, Complexity, Viability	
User Experience & Design	● Voice of Veteran	Testing prep & recruiting	● Voice of Veteran				Stakeholder Interviews			
	Design iterations		Design iterations				Current State Journey Map		Ongoing Journey Map Refinement	
Engineering & Development	POC for data flow									
	Build solution (form UI, data connections, storage, etc.)								Tech Integrations	
Collaboration Cycle		◆ Research Plan Review #2 (wireframes)	◆ Content & IA Review	◆ Midpoint Review	◆ Privacy & Security review				◆ Staging Review	◆ Analytics Review ◆ MVP Launch Date Dependent on Legal Review Completion ◆ Contact Center 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

Appendix

1095-B Sprint team velocity

1095-B Tax Document Team Velocity
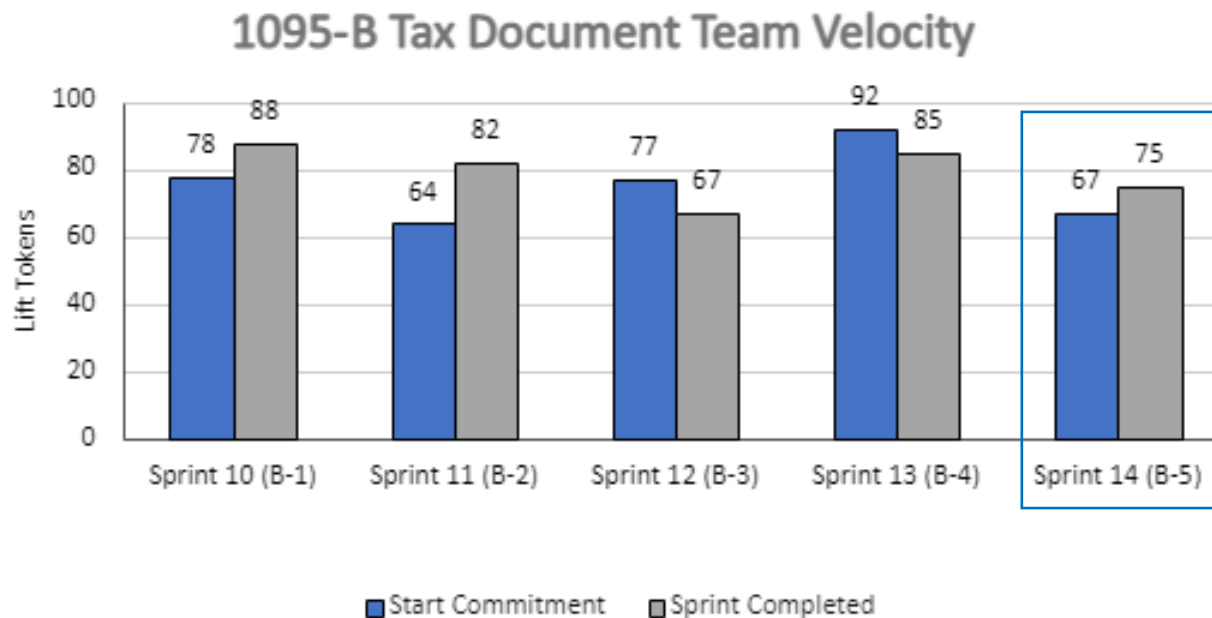
Velocity details

- Velocity estimated in story points, using Fibonacci

- Velocity in Sprint 5 accounted for 10 team members

- 75 total story points were completed; Team committed to 67 story points at beginning of the sprint, 9 were blocked, 8 no longer relevant, and 25 additional story points added.

  - 9 story point blocked due to postponement of staging review and have been added to next sprint work

  - 8 story points were removed due to being superseded / enveloped by other stories

  - 25 story points were added with two stories brought forward due to tech capacity (5), three stories were added midcycle by business owner request (7), three stories were created midcycle after receiving new knowledge in accessibility discovery and developing community care exploration (12), and one story was added for platform offboarding (1).

  - All collaboration cycle events were not assigned story points

* 9 story points are not accounted for in deliverables slides (24-26); VA platform onboarding /offboarding (6), collaboration cycle feedback Mural (3)

Project risks and mitigation strategies

Submitted as part of the Monthly Report for March

RISK AND IMPACT	MITIGATION STRATEGY	DATE ENTERED	CLOSED	STATUS	NOTES
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		🟢	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