

HCD Pension Eligible Prioritization - PRE READ

Background: How did we get to the proposed approach and next steps?

- 1) We started with review of all the pension-related research and other related data and mapped opportunities across research, design, and implementation phases.
- 2) Then we reviewed the signals document to identify where the highest number of pain points and opportunities expressed throughout completed studies, SME feedback, and other related data.
- 3) Completed initial internal assessment based on impact and feasibility.
- 4) Research and design worked together to examine potential initiatives and map relevant user and business needs more closely, accounting for impacts to pension eligible Veterans - both positive and negative, potential risks related to unintended cascade effects, and existing tickets already underway.

Through this work we arrived at the proposed approach outlined. More detail regarding the rationale and factors considered are included below. The identified bodies of work have been displayed in order of proposed priority. Note that design and testing items can likely be worked on in parallel.

Additional Note: Known exploratory research tasks related to pension eligible work have been moved into planning and are not depicted here.

Stage (Design, Testing, Implementation)	Form Section	Associated Subsection	Associated Ticket	Proposed Approach	Action Items	Estimated Size	Estimated Time	Problem Statement	How Might We	Hypothesis	Rationale
Initiatives ordered sequentially											
Design	Review and Submit	Review page	Review page, design fixes for multi-response list loop items. (#95498)	The multi-response list and loop pattern causes display issues on the form review page. Some design work needs to be done to improve the visual hierarchy and interaction patterns on the page by applying the appropriate heading styles and padding.	Design will conduct a brief exploration to understand existing guidance and how other teams have implemented this pattern. From there, updates to review page will be designed.	Small	Exploration and design is estimated to take place over the course of 1-2 sprints.	Currently, a bug exists where the multi-response list and loop pattern causes display issues on the form review page that need to be fixed.	How might we ensure Veterans can effectively view their application and make any necessary changes before submitting?	By fixing the existing display issues on the form review caused by the multi-response list and loop pattern, we anticipate Veterans will be better able to catch and update errors to their application prior to submission.	Note that this item has already been approved and is currently queued up for next sprint (sprint 12). This is seen as a small task that will impact a number of design updates related to the multi-response list loop pattern. Once the updated review page has been developed, tickets marked as 'ready for implementation below' can be updated accordingly and will be ready for testing.
	Introduction	Introduction page	Improve form introduction context. (#77724) - design ticket Improve form introduction context. (#86387) - app ticket	After collaborating with design on the existing designs intended to improve the introduction page, we have determined that this page is ready for implementation.	Design will revisit for a final review as this has been sitting in staging for some time. From there, Engineering will implement and release these improvements to the introduction page.	Small	We estimate that this work can be reviewed and implemented over the course of 1-2 sprints.	Through usability testing and conversations with VSOs and VBA SMEs, we have learned that Veterans and their families may be confused about or unaware of the different types of pension, potentially leading them to apply for the wrong benefit.	How might the information page adequately provide enough detail and context, so applicants feel more confident they are applying for the right benefit?	By providing information about the different types of pension and highlighting eligibility criteria on the introduction page, we anticipate that Veterans and their families will feel more confident about starting their application for Veterans Pension and be better prepared with the necessary supporting information to fill out their application successfully.	This is seen as a minor change and a quick win that we anticipate will improve the user experience with limited additional effort needed to get this across the finish line. While not initially a goal of the ITF comprehension study, we received a significant amount of feedback about the introduction page through this research. With this in mind, we feel confident that this change will not negatively impact the Veteran experience. Additionally, shipping these changes will allow us to link to a page already created by CAIA explaining the differences between military retirement pension and Veterans Pension. To date, this page is not being directly utilized by our form. While additional usability testing of these changes does not feel valuable at this point, note that the research team is planning to incorporate exploratory questions related to the introduction page in upcoming pension-eligible research.
Implementation	Review and Submit	Supporting Documents (end-form summary page)	Improve supporting docs page. (#86521)	The design updates to the supporting documents page itself are ready for implementation without additional testing.	Design will revisit for a final review as this has been sitting in staging for some time. From there, Engineering will implement and release these improvements to the supporting documents page.	Small	We estimate that this work can be reviewed and implemented over the course of 1-2 sprints.	Veterans do not fully understand what evidence and supporting documents to submit with their application, resulting in development letters and longer claim processing times. On the supporting documents page, we ask for additional evidence in certain situations, but we don't provide any detail about what type of evidence to submit, what information to include, or how to submit it.	How might we ensure the supporting documents page adequately addresses all use cases?***	Providing a supporting documents summary page that uses conditional logic to display the appropriate forms and additional information needed, based on an applicant's answers to questions within the form, will make it easier for applicants to submit the required supporting documentation resulting in fewer development letters and faster claim processing.	This sub-task of #86521 (the supporting documents page itself) should be prioritized for release because it will provide necessary information that is currently missing from the form. On the current version of the form, there are scenarios that we aren't accounting for and implementing this design would allow us to incorporate content that CAIA has already written to address said scenarios. Implementing this change will make the incomplete, complete. For these reasons, we don't recommend testing prior to release. *** Important to note, we don't think this is the be all end all solution. We haven't arrived at the ideal solution but we think that this thing that has already been built they will at least have missing information while we explore other additional enhancements. Continuing to understand needs related to supporting documentation may also be explored during upcoming pension-eligible research.
	Initiatives can run in parallel										
Financial Information	Assets		Clarify dependent's assets questions (#75212)	Initial design exploration is likely to take place over the course of a couple of sprints. As exploration is in progress, we assume that tasks and subtasks may expand as opportunities are refined and next steps are identified.	The definition of who is a dependent for the purposes of reporting assets is unclear, resulting in inaccurate information in form submissions (e.g., applicants may submit information for childrent who are not dependents or may not report information for a spouse or parent who is a dependent)	Large	The definition of "assets" and "transferring assets" for the purposes of reporting income and assets is unclear, which results in inaccurate information in form submissions. Reporting information related to income sources is confusing for applicants resulting in inaccurate or incomplete information on applications.	How might we clarify language related to "dependents" to help applicants submit accurate information?	How might we clarify language related to "assets" and "transferring assets" to help applicants submit accurate information?	Updating the content in the dependent section to clarify the definition of a dependent for the purposes of calculating assets will help applicants submit accurate information and lead to faster processing times. Reviewing and clarifying language related to the term "dependents" in other parts of the form (e.g., reporting dependent children) will improve overall comprehension of how to report information related to dependents and boost applicant confidence in their answers.	The financial information section has been identified as a high priority area with many associated pain points across multiple studies and audiences, including studies with Veterans, VSRs, and VSOs. Improvement in this area strongly aligns with both user and business goals, such as simplifying the form and reducing processing time and resources. The risk of not taking action is also rated as high as it may result in issues such as: increased abandonment rate, inaccurate or missing information on an application, and accessibility concerns. The existing tickets should be considered as part of a holistic review of the financial information section to ensure continuity across these proposed design improvements.
			Provide context on assets. (#75671)								
	Income		Clarify income sources (#75213)								
	We suggest starting with a design investigation focused on the Financial Information section primarily. During this time there may be some items that are also related to other sections of the form that overlap thematically with the financial information. (Examples: Terminology consistency re: dependents in Household Information and current employment in Health and Employment. In those instances additional tasks may be incorporated as the work becomes more refined.									Design will start an exploratory spike and take subsequent action from there. Research will support as needed.	

