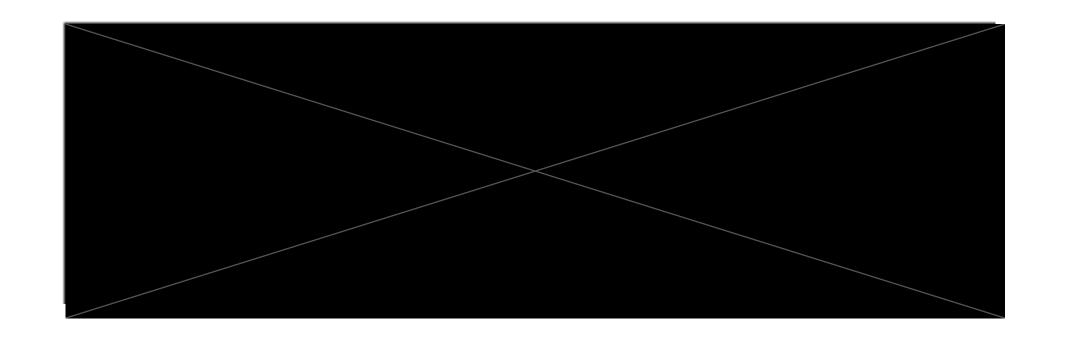
# + USDS Final Report and Demos





#### NORTH STAR

Increase SNAP application processing timeliness by 10% +

#### APPROACH

#### Discovery

- Kick-off and north star
- Desk research
- Shadow eligibility advisors
- Gather quantitative data
- Analyze and synthesize findings to identify common challenges

#### Onsite

- Application processing demo
- Align on top challenges
- Co-design solutions with frontline workers
- Impact and level of effort assessments
- Leadership prioritization
- Final report

#### Implementation

- Identify Product Owners
- Break into working groups based on prioritized recommendations
- Conduct additional discovery, prototype designs, validate and test with EAs, and iterate
- Finalize MVPs and draft Epics







#### RECOMMENDATIONS OVERVIEW



1 Improve Relationships UX

Up to 5 minutes saved per application Up to 38 hours saved per EA annually

Up to 210K total hours saved annually

Simplified
Previously called 'Driver Flows'

Up to 1 minute saved per application Up to 8 hours saved per EA annually

Up to 84k hours saved annually



Up to 1 hour saved per Track EA daily
Up to 2 hours saved for Supervisors
daily

Up to 1.3M hours saved annually

Additional initiatives

## **Extend System Timeouts / Implement Autosave Functionality**

Up to 4 hours per EA per week
Up to 200 hours per EA annually

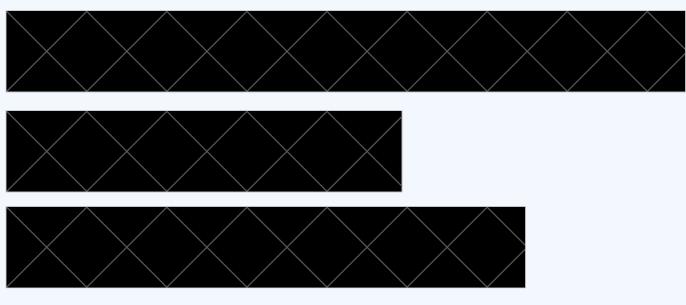
Up to 1.1M total hours saved annually

## Implement Responsive Layouts Across

Up to 5 minutes saved per application Up to 38 hours saved per EA annually

Up to 210K total hours saved annually

# 10 Relationships UX



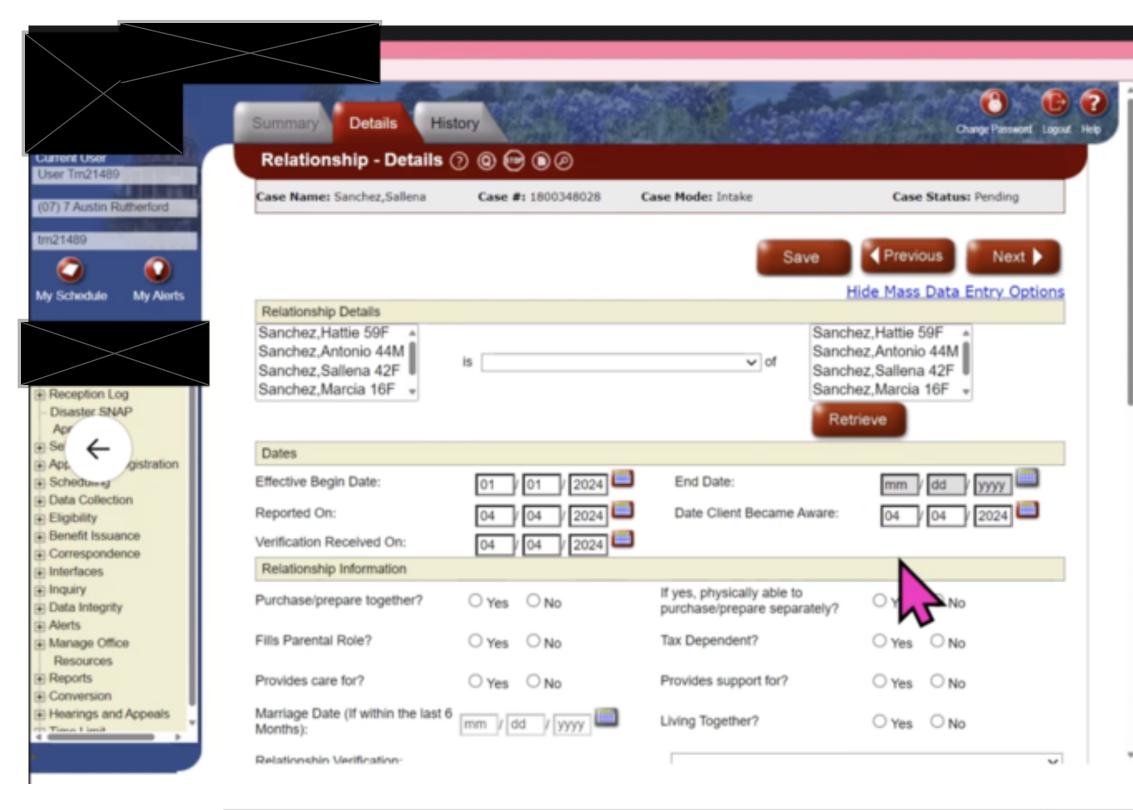
#### **Recommendations Overview**

- Streamline the Relationships Details page by removing or relocating fields
- Ensure all fields/content are viewable on one screen, eliminate need for horizontal scrolling and pagination
- Default to collapsing the bulk data entry section, and showing the relationship grid, the EApreferred data entry method
- Increase readability and navigation by updating date entry fields and adding visual progress indicators (i.e., row numbers, completion icon)

#### **CURRENT STATE**

#### Relationships UX

Data entry is presented two ways, and EAs must scroll down to access their preferred data entry

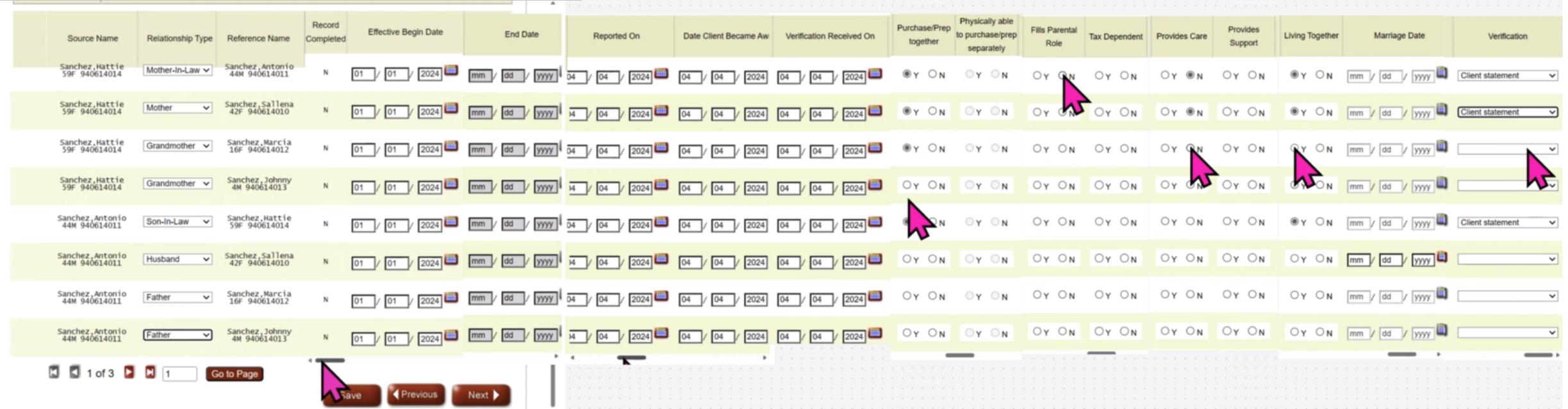


EAs struggle with numerous usability challenges to completing all tasks on the page

"I don't even want to do food stamps because of that screen." – EA

Information that is **not**relevant to relationships is
presented on the screen

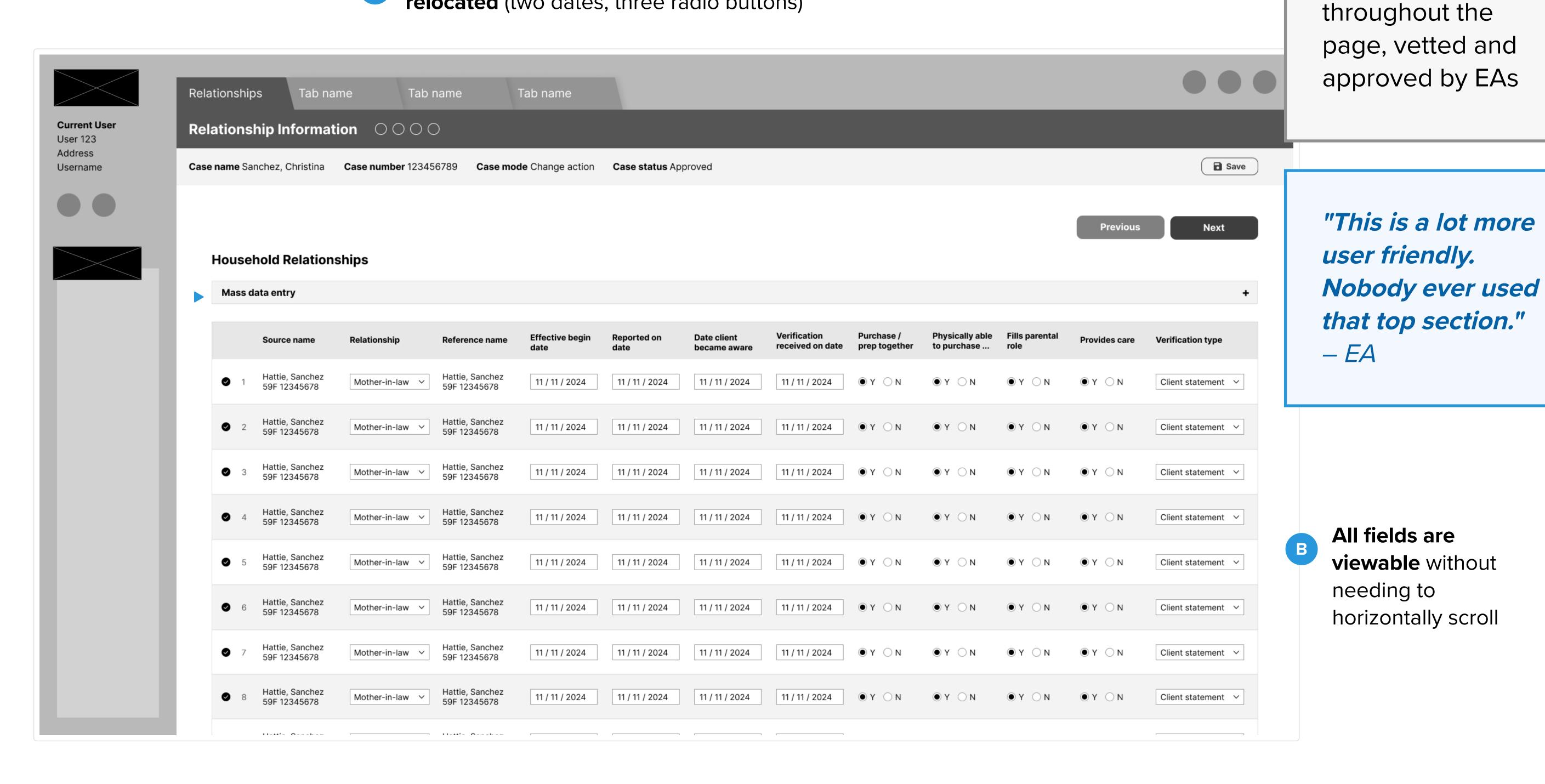
EAs must **scroll right** to be able to view all questions



#### Relationships UX

Five irrelevant fields were removed or relocated (two dates, three radio buttons)

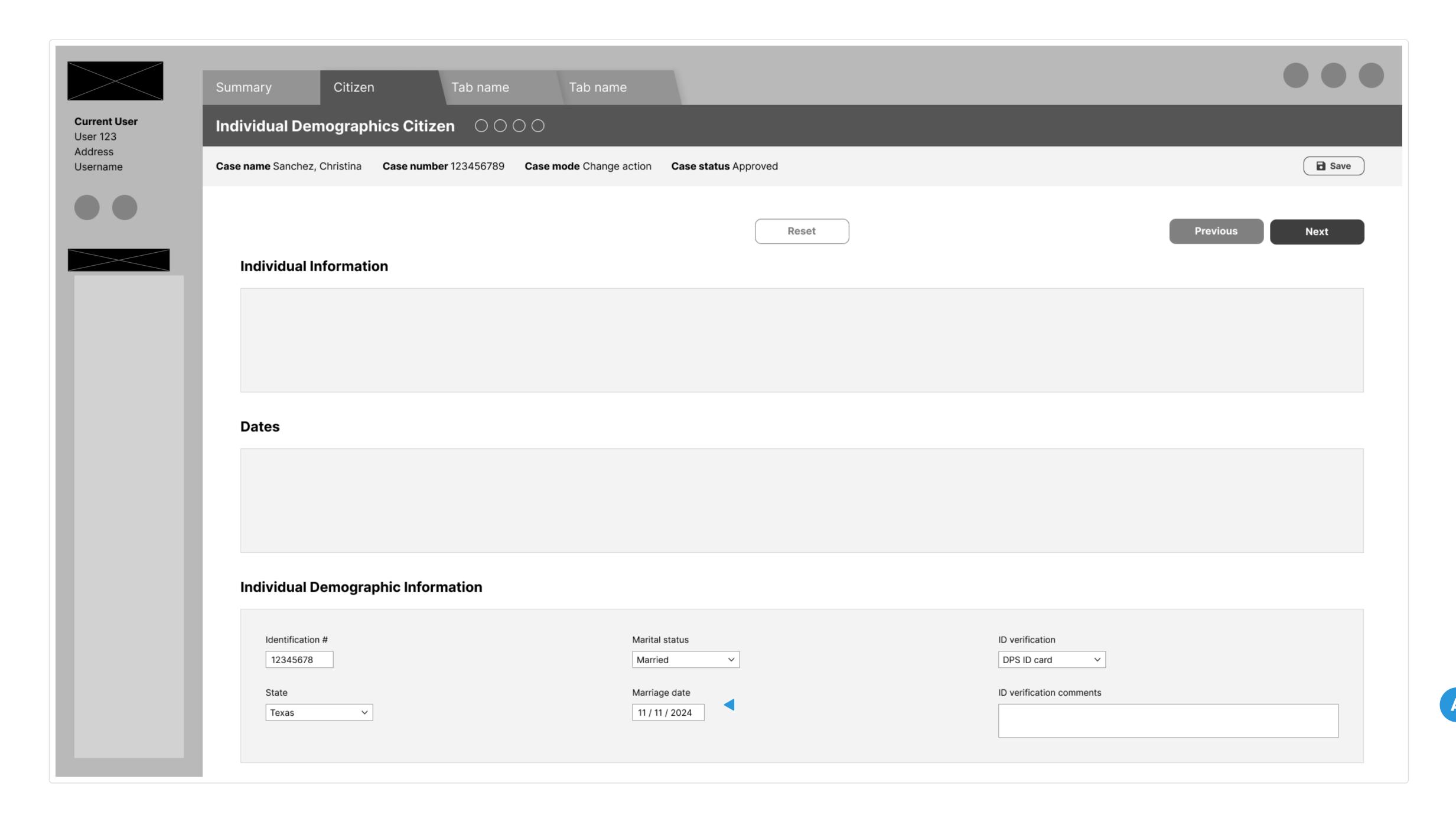
Non-preferred data entry view is collapsed so that the preferred view is easily available without needing to vertically scroll



Multiple **usability** 

improvements

#### Relationships UX: Individual Demographics



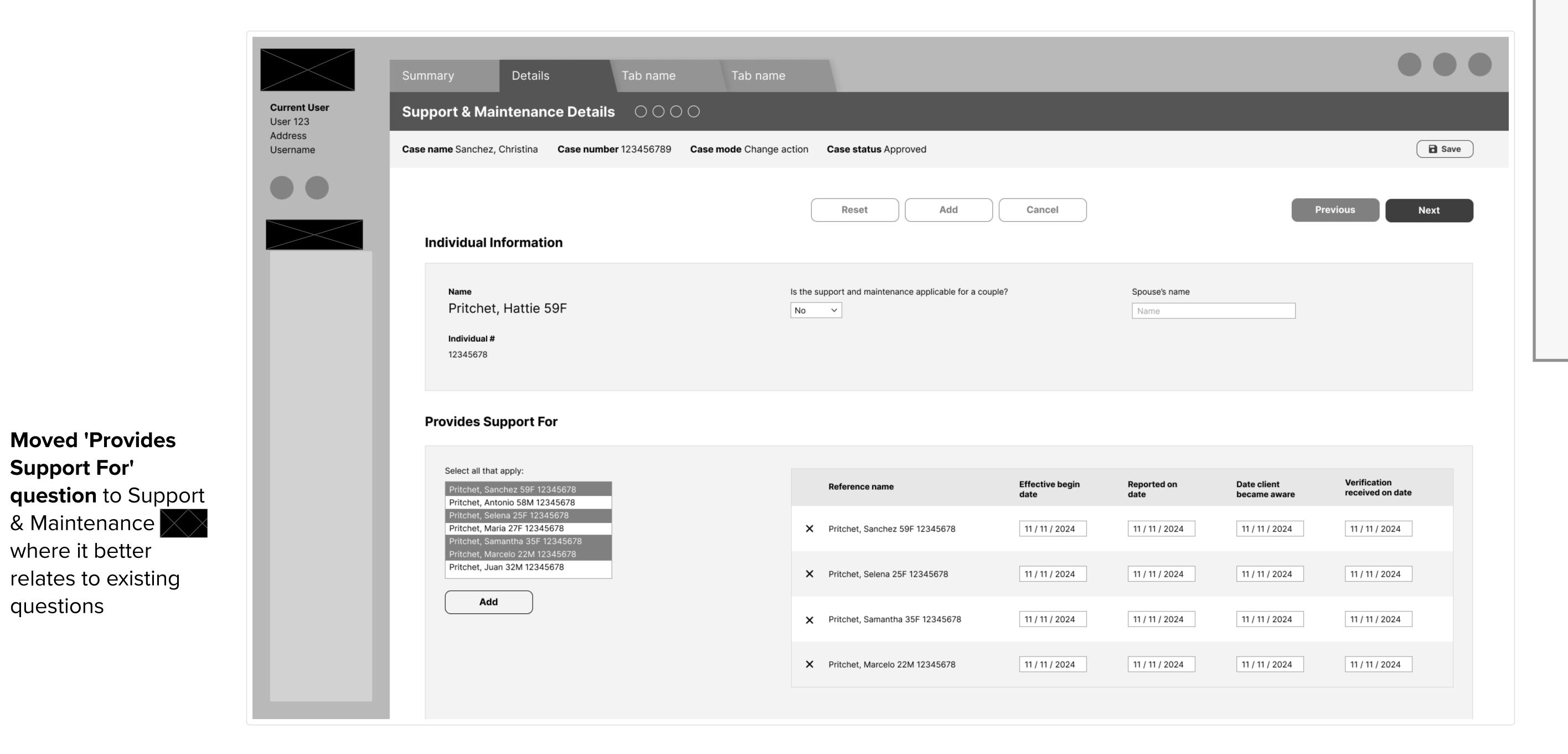
Moved 'Marriage date' question to Individual Demographics where it better relates to existing questions

**Support For'** 

where it better

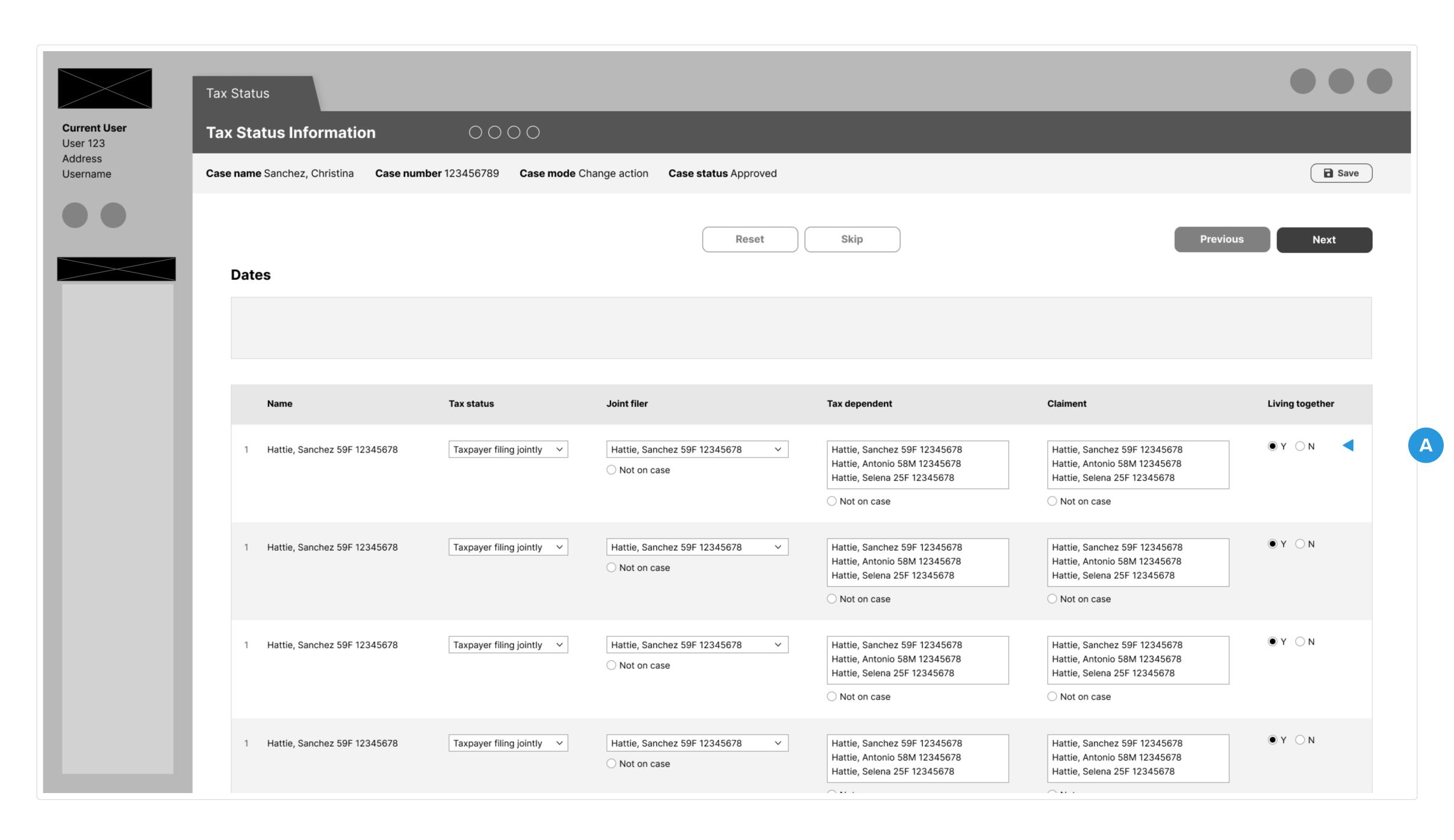
questions

#### Relationships UX: Support & Maintenance



Created new **Provides Support** For section with new input design updated for clarity, allows for dates to be edited if needed. New design allows EAs to select multiple household members at once.

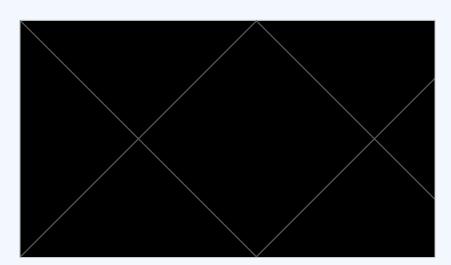
#### Relationships UX: Tax Status Information



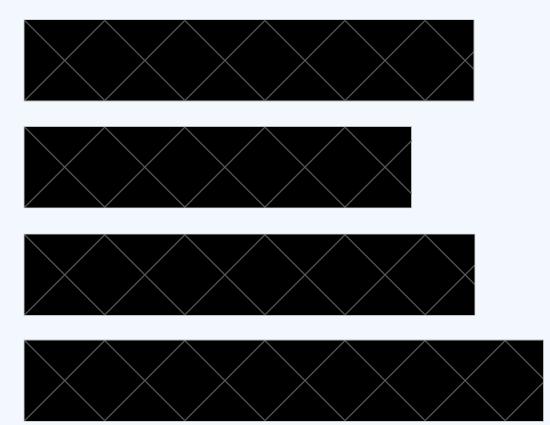
Moved 'Living together' question to the Tax Status LUW where it better relates to existing questions



## Simplified



**Previously called 'Driver Flows'** 



#### **Recommendations Overview**

- Organize information on screens by program and action (e.g., Medicaid, open interface), starting with the Individual Page
- Emphasize required data entry questions to assist newer EAs
- Enhance usability and vertically align text input and dropdown fields instead of floated left/right through the page. This allows EAs to move continuously up/down the page to interact with form fields.

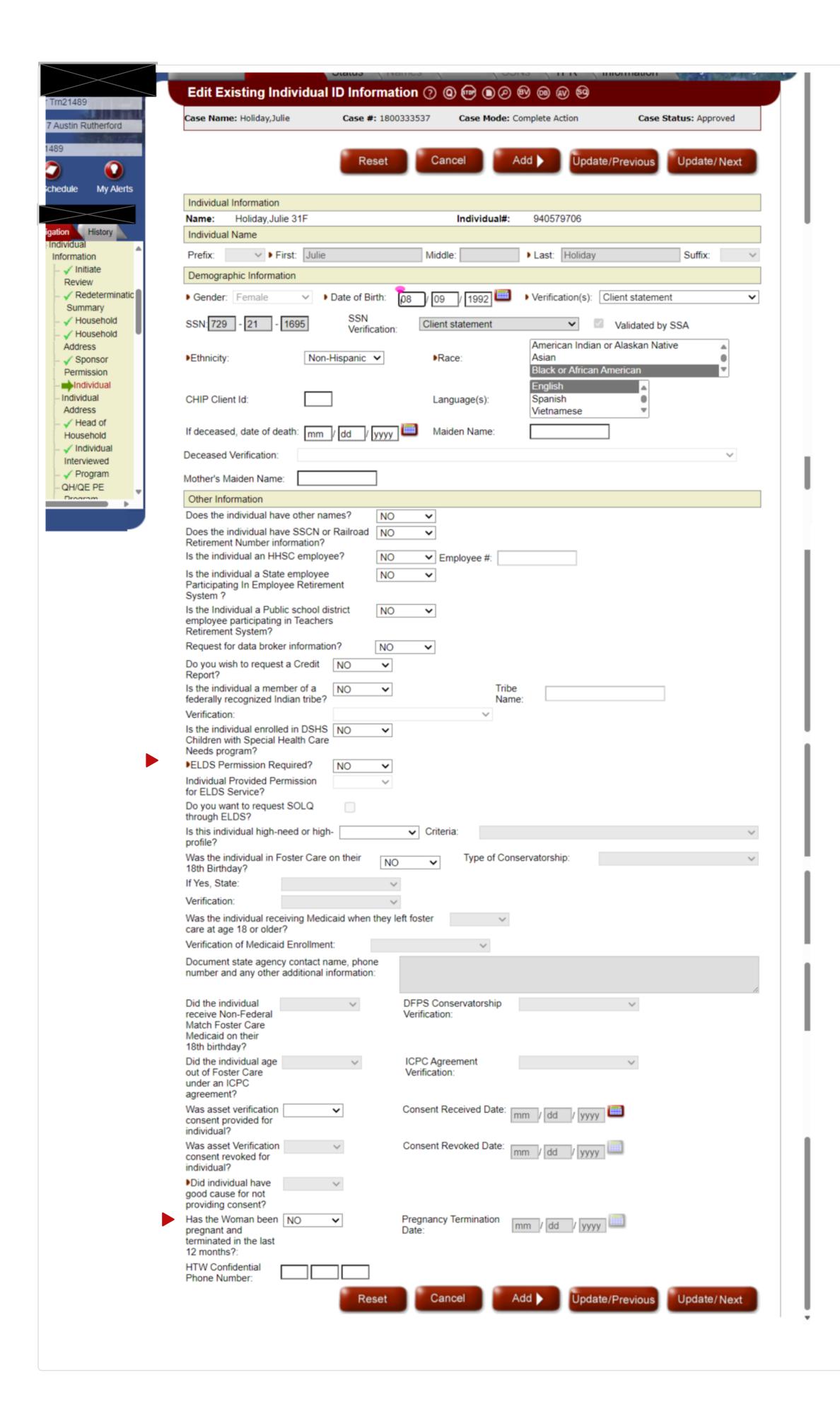
#### **CURRENT STATE**

## Simplified

There are many questions not relevant to the cases that EAs are processing

Current view buries required questions within the list of all questions, many of which EAs do not touch

It is difficult to determine which questions are actually required for which program; tenured EAs must use memorization



Current design
prioritizes data
collection across
all programs over
efficient case
processing

each page isn't laid out well and not built for efficiency"

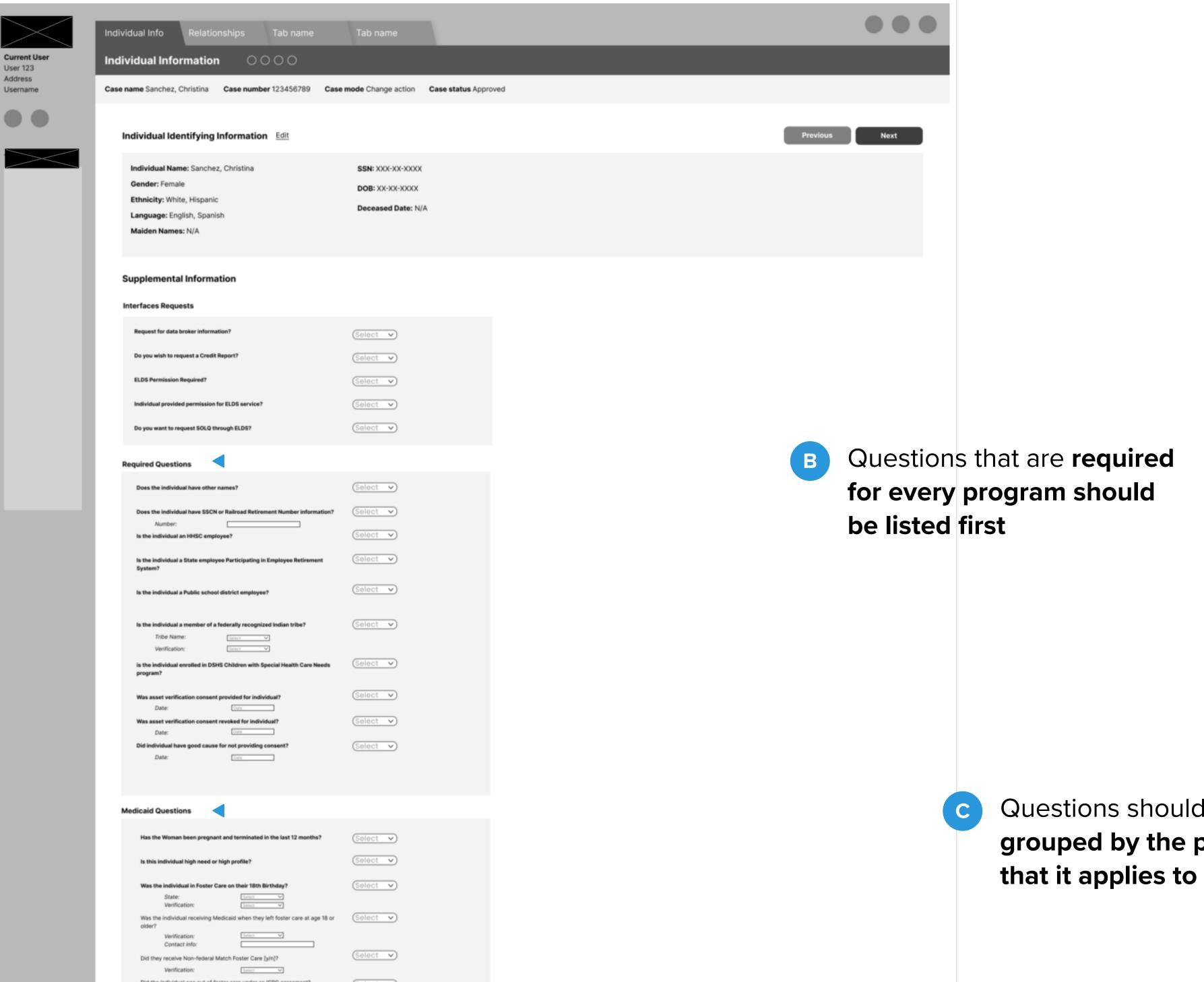
- EA

The layout is
cluttered and
misaligned,
making skimming
hard and requiring
excessive scrolling

### Simplified



Re-ordering and pulling out the most used and answered questions helps EAs prioritize



Phase 1 implementation to **re-order** questions and create sections

"[My] number one choice is just reorganizing questions." – EA

Questions should be grouped by the program

UI updated to be

easy to skim and

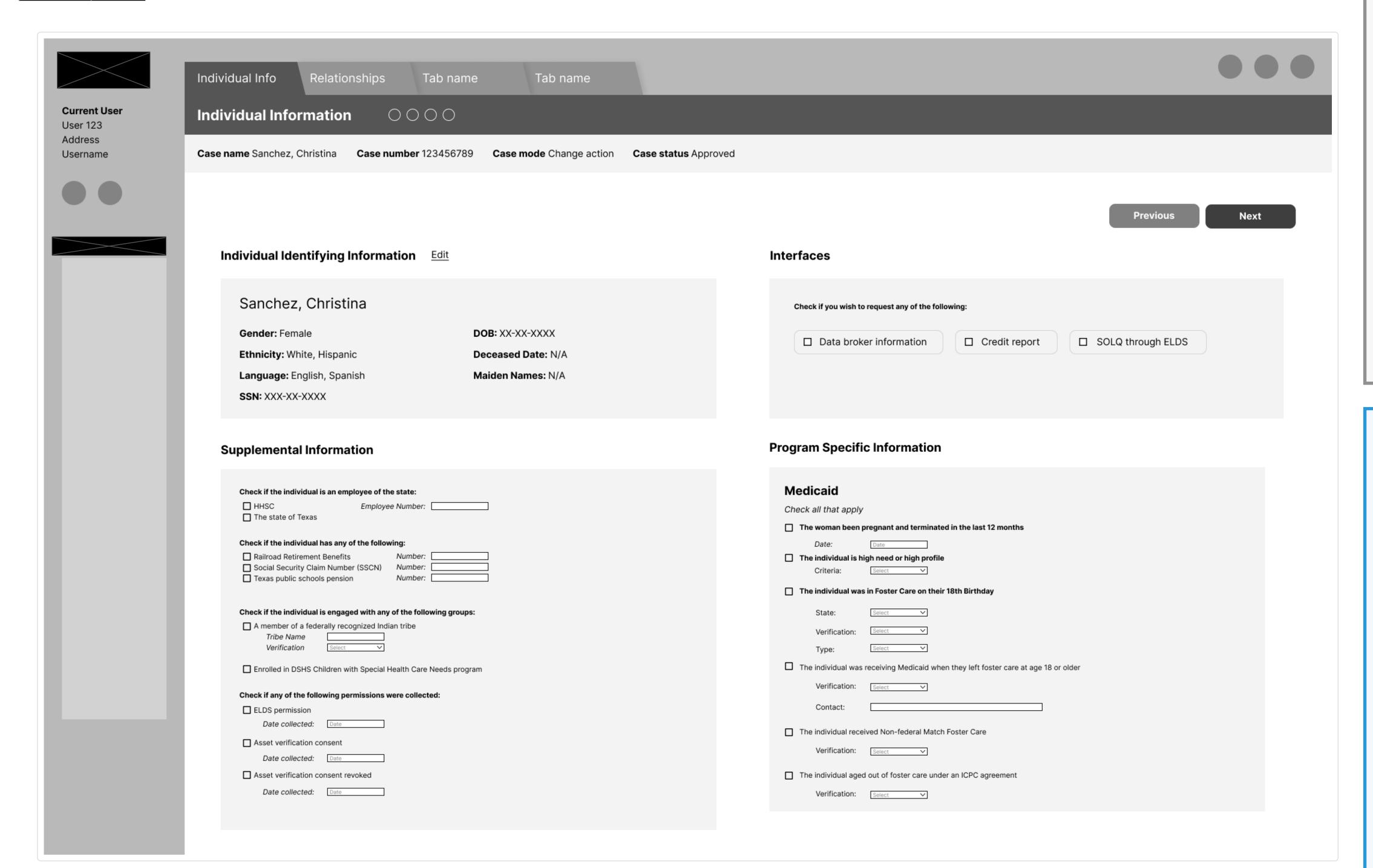
screen (as much

as possible) to be

fit on a single

most efficient

### Simplified



Phase 2 implementation to take advantage of wider screen and make **additional** usability improvements such as checkboxes instead of dropdowns

"I like that it's all up at the top, I don't have to scroll down 2 miles to get to specific questions. I do like the individual check boxes for RSDI and SSN." -EA

#### ADDITIONAL RECOMMENDATIONS

#### **Question Management**

- Review questions on a regular basis to ensure they are still necessary
- Engage EAs in determining which questions appear in which
- Create a running list of every single question in and its purpose

#### **Content Design**

- As improves, consider the "journey", or "flow" that EAs take throughout the entire determination process, so that similar content is grouped together
- Write questions in a way that is easily understandable for anyone

#### **User Experience**

- Use check boxes for quicker confirmation for binary answers (yes/no)
- Align boxes, drop-downs, etc. to help improve ease of use (e.g. all drop downs are aligned on a page)
- Group questions by program visually to help EAs review each screen efficiently

#### Learnings from

- Saving 8-10 minutes on re-det cases
- ~20% faster when using
- Low EA adoption (currently ~30%)
- Gaps in training EAs get stuck, intended for newer EAs but exclusive to more tenured EAs
- Lack of PO/roadmap champion
- Missing functionality (additional need to be included)



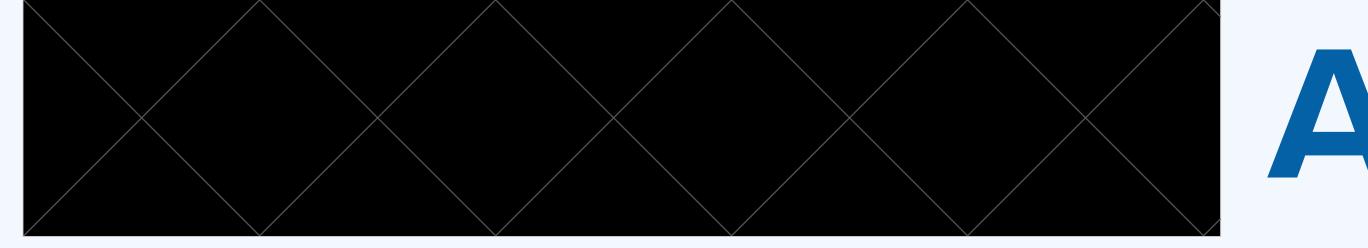
#### Recommendations

- Empower and assign PO
- Evaluate current training and build EA confidence around tool
- Set goals for progress:
  - Goal KPI 75% usage
  - 10k additional work hours
  - 15k additional re-dets/month

#### **Expand** to Re-Applications

- Large volume of cases
- Re-apps are more similar to a re-det
- Estimated impact:
  - Time savings (5 min)
  - Assume 50% EA adoption
  - 8k additional work hours
  - 10k additional re-apps/month





Auto-

## Upload

Previously called 'Due Today'

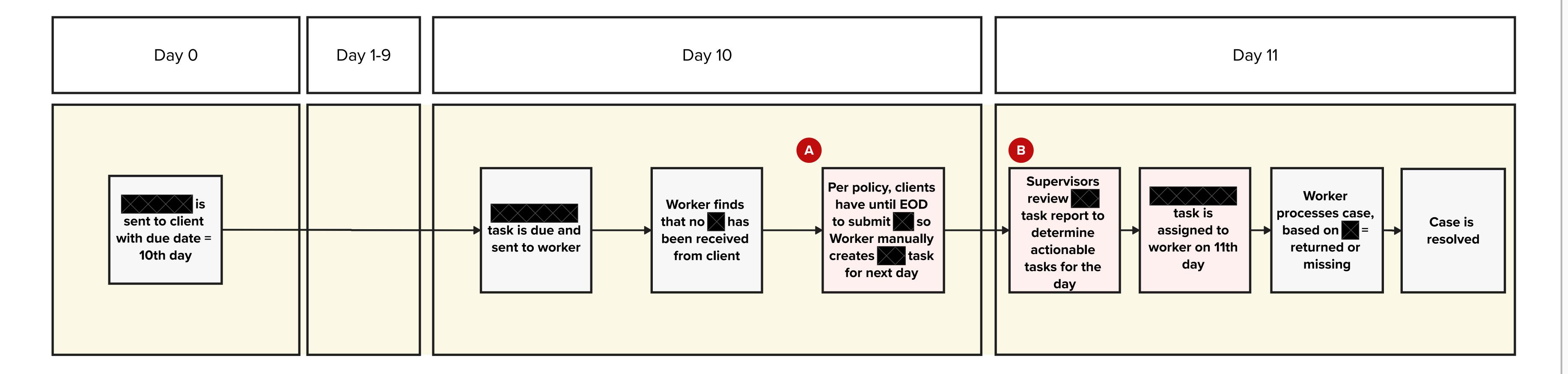


#### **Recommendations Overview**

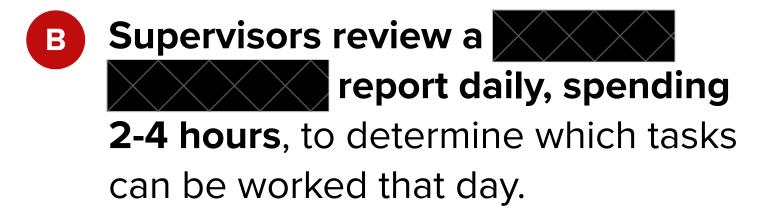
- Create new business rule that will auto-upload tasks on the first day they can be worked
- Reduce manual reconciliation work that frontline and supervisors perform on a daily basis

#### **CURRENT STATE**



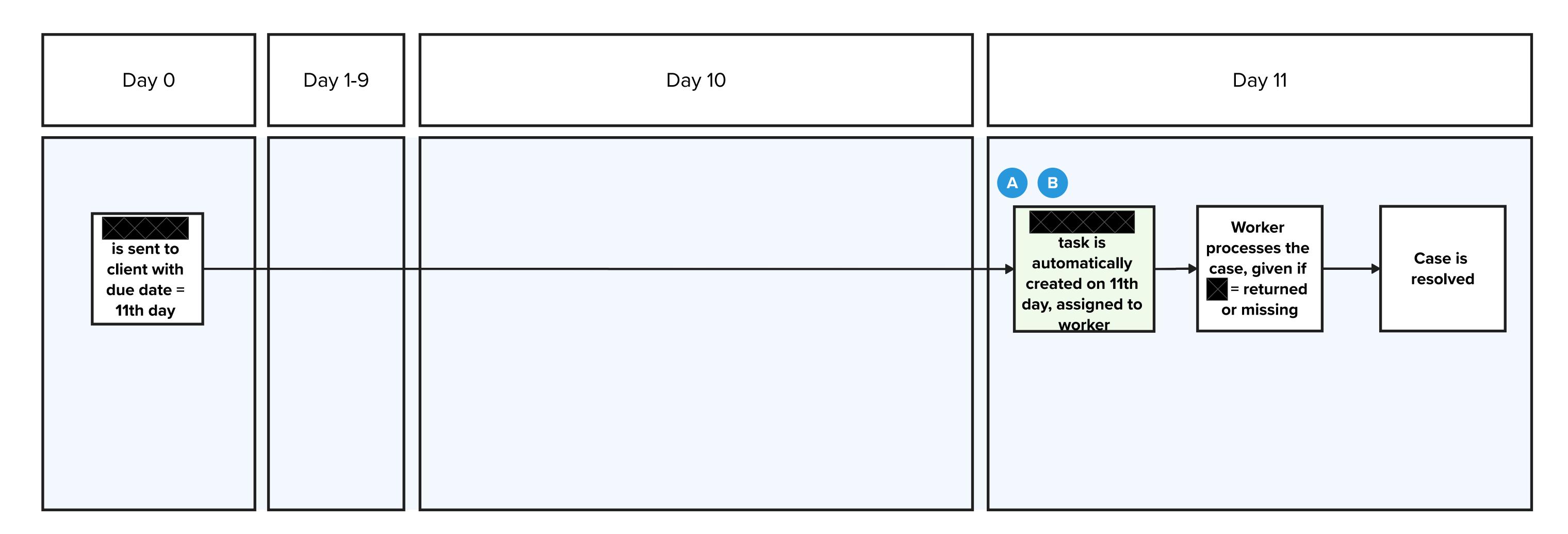






"It would be thousands of hours [spent on reconciliation] if were to add up the hours we do and can't do" – State staff





tasks are now created on the 11th morning, when they can actually be worked by advisors, removing the need for manual review and task creation on the 10th date. This new rule will apply to both timely and overdue application cases.

B Supervisors will see a 10-30% reduction in their reports.





#### Current State Future State State

timeouts after 30 minutes, resulting in loss of work estimated at 4 hours/EA weekly

#### **Extend Non-Required System Timeouts**

Extend timeout from 30 minutes to 2 hours

#### **Autosave Functionality**

 Add auto-save functionality to the Relationship and Income Expense Payments screen to prevent EAs from losing work on time intensive screens.

Modifications will deploy

has a fixed screen size, resulting in workers having to scroll horizontally to see content

#### Implement Responsive Layouts across

so that all questions are visible on the screen without requiring scrolling right

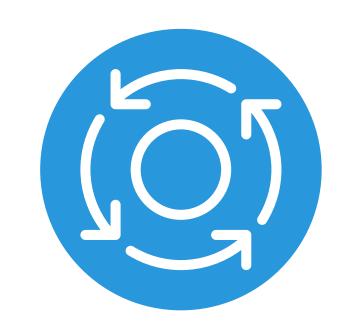
- Effort will resize two prioritized Screens (Relationship & Income/Expense Payment) to fit current monitor size.
- Modification will deploy
- screens in a later phase

#### FUTURE CONSIDERATIONS



## Engage workers early and often in development process, integrate user feedback into Epic development

- Implement usability testing
- Create an EA advisory council
- Include EAs in work groups



#### Plan solutions iteratively to tackle complex challenges, testing and learning along the way

- Start small with MVP prototypes
  - Use Testable --> Usable --> Lovable framework
- Test with 5 users; iterate; repeat
- Test and iterate on UX and technical design before committing to code
- Don't eat the elephant all at once!



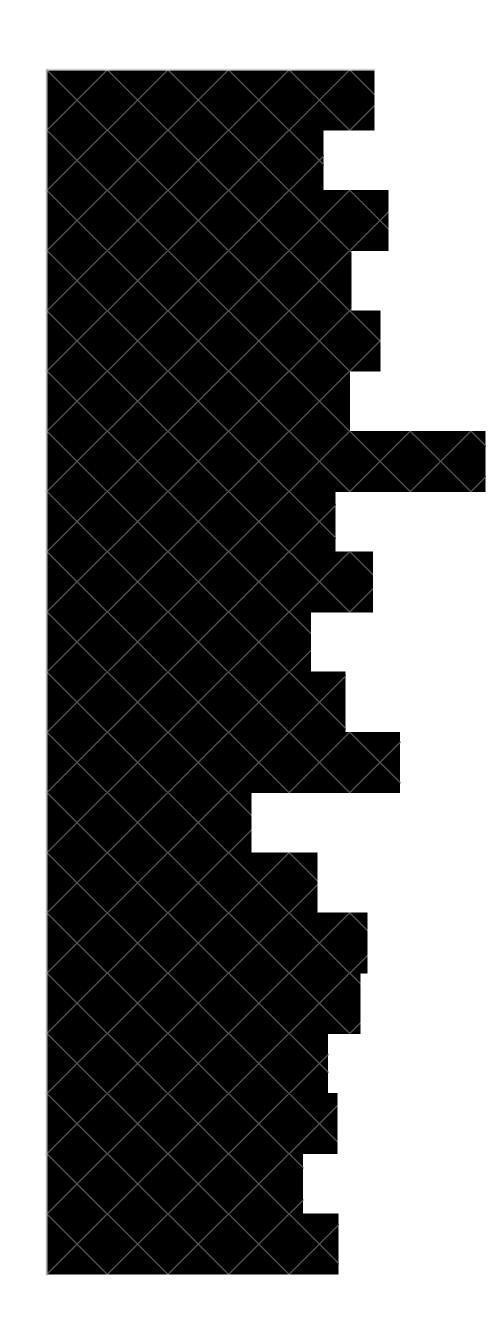
## Create and operationalize outcome-driven metrics (e.g., Time To Process) to track the impact of changes

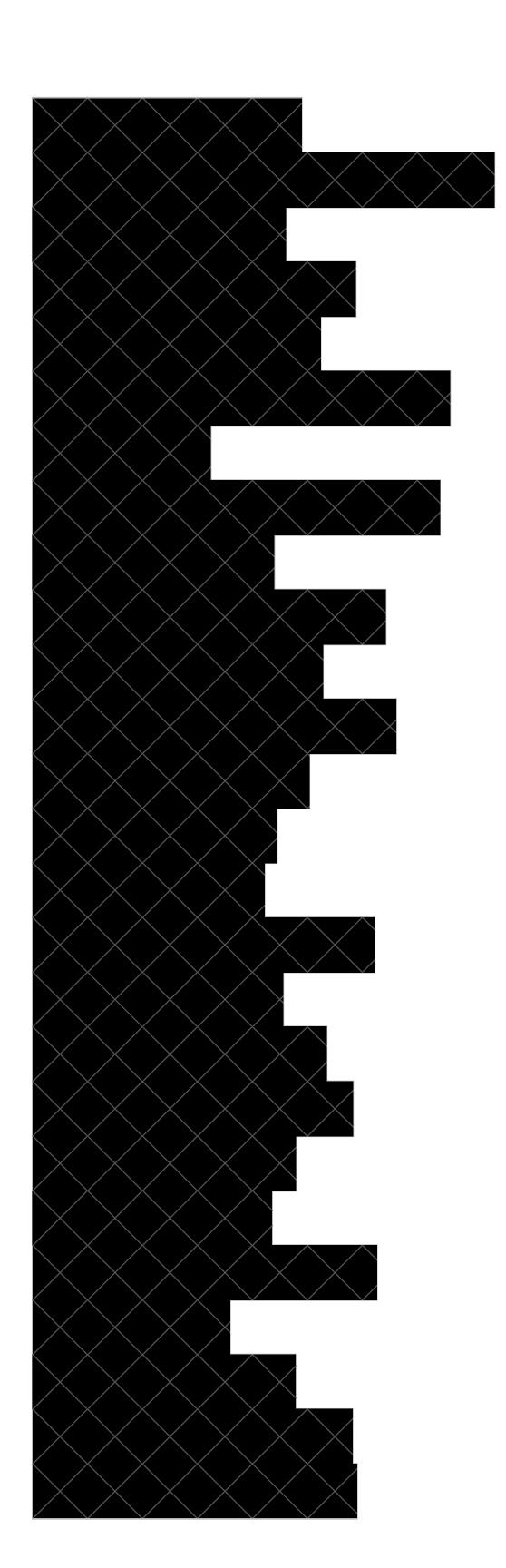
- Track how users are currently working to understand system usage
- Use data in addition to qualitative, and anecdotal evidence
- Evaluate efficacy of changes

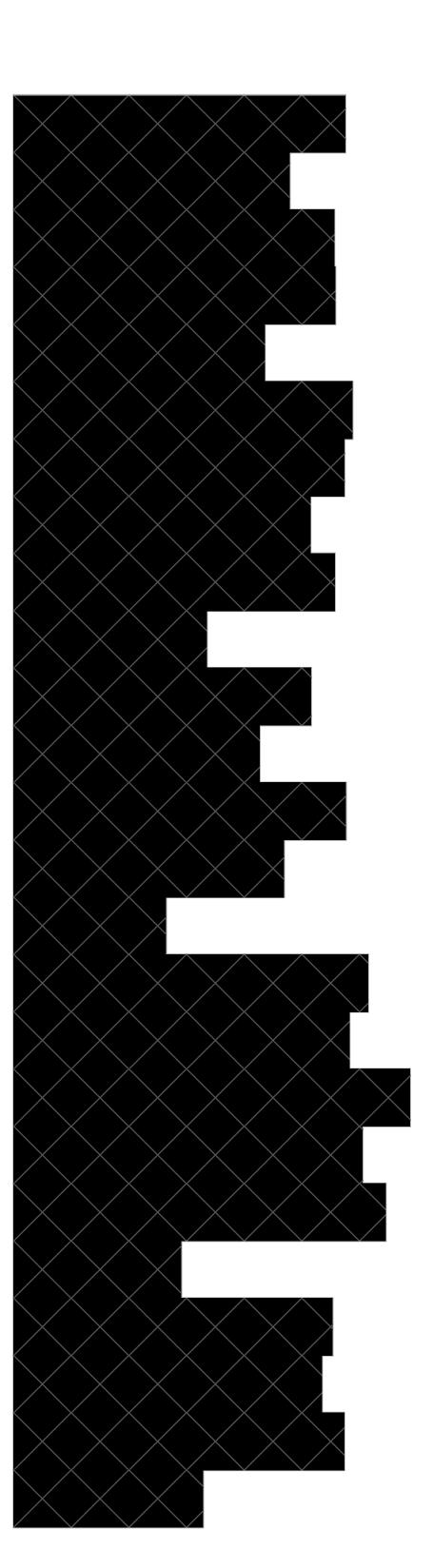
#### **NEXT STEPS**

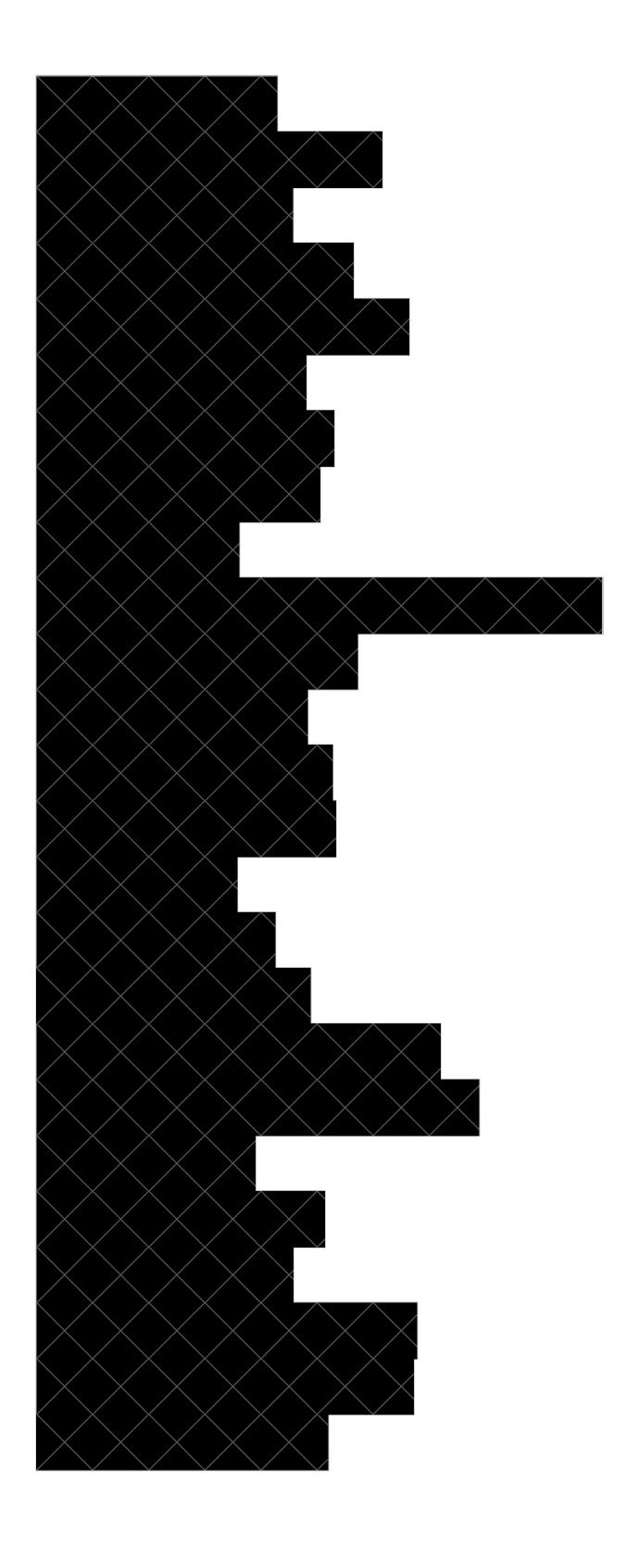
- USDS will support Leads with completing Epic documents (~1-2 weeks), reviews by working group
- Monthly x USDS check-ins to track progress and help unblock
- USDS available for ad-hoc meetings, feedback, or questions via email

## THANK YOU









+ U.S. Digital Service