[DRAFT] ██████████ Recommendations

US Digital Service | ████████

Executive Summary

The followin███ recommendations are the result of a collaboration between the ████████ ███████████████████████ and the United States Digital Service (USDS). **Together, we set the north star goal of ████████ to increase SNAP application timeliness rates by 10% in addition to improving the experience of eligibility advisors (EAs).**

Through an intensive discovery sprint that included shadowing eligibility advisors (EAs), regional staff, and on-the-ground workshops with key ████ staff, we arrived at an implementation consensus on the following recommendations.

Below is a summar█ of the near-term recommendations and their potential impact, based on data █rovided by ██████ and estimates provided by eligibility workers. As a next ste█ USDS and ████ teams will collaborate to define the scope and output for MVP deliverables ████ ██████

#	Recommendation	Potential Impact
1	Improve ████ "Relationship Page" UX	Up to 5 minutes saved per new application; Up to 38 hours saved per EA annually
2	Identify and test new █iver flows	Up to 10 minutes saved per new application; Up to 75 hours █aved per EA annually
3	Auto-create ████ task for overdue ████████ task	Up to 1 hour saved per day per blue track EA; Up to 250 hours per EA annually and 1000 hours per ████████ Supervisor annually
████ Le█ Initiatives - USDS available to advise upon request		
4	Improve usability of ████ to reduce inquiry burden	Up to 15 minutes per EA per case for tenured EAs and up to 1 hour for newer EAs; 112 hours saved per tenured EA annually and up to 450 hours saved per new EA annually
5	Improve bundling in ████ and ████	Up to 15 minutes per EA per case for tenured EAs and up to 1 hour for newer EAs; 112 hours saved per tenured EA annually and up to 450 hours saved per new EA annually
6	Implement auto save functionality across ████ and remove non-required system timeouts	Up to 4 hours per EA per week; 200 hours per EA annually
7	Implement responsive screen sizing in ████ so all questions are viewable without horizontal scrolling	Up to 5 minutes saved per case; Up to 38 hours saved per EA annually

Near-term Recommendations

1. Improve ▨▨ "Relationship Page" UX

Current state: EAs can spend up to 30 minutes for complex cases to complete the Relationship Page in ▨▨ alone, validated by both shadow sessions and onsite conversations. Currently, the Relationship Page combines both data entry and determination questions, which asks EAs to consider both simultaneously. A number of more specific issues make relationships particularly difficult and time-consuming:

- Currently the system requires EAs to enter all relationships bi-directionally, which, for a typical 5-person household, results in 20 entries. For a 10-person household, EAs complete 90 entries.
- EAs must also answer 8 questions about each individual household member; this functionality is also housed within a horizontally scrolling table, which is difficult to see all questions and navigate.
- A number of the questions asked about each individual are not necessarily relevant to the household relationships (for ex. tax status).
- It can be difficult to make changes to household members who no longer live in the household.
- Dates relative to relationships present a number of challenges and often require repeated corrections.

Proposal: USDS and the ▨ team propose re-designing the "Relationship Page" to better suit EA usability and increase ease-of-use. During our feasibility session, we aligned on a few fields that could be removed without altering eligibility/benefits determination or removing ▨▨ content. There are existing ▨▨▨▨▨▨▨▨▨▨, distinct sections of related ▨▨ pages, that intuitively correspond to existing fields in the Relationship Page. During discovery and feasibility discussions, we aligned on ▨▨ that may be better suited to collect this data:

- *Tax Dependency.* This field only applies to TANF and has no bearing on SNAP eligibility or benefits. This should likely move to the Tax Status ▨▨
- *Provides Support For.* This field only applies to ▨▨ and has no bearing on SNAP eligibility or benefits. This should likely move to the Support and Maintenance ▨▨
- *Living Together.* This field only applies to Medicaid and has no bearing on SNAP eligibility or benefits. This should likely move to the Living Arrangements ▨▨

For the recommended ▨▨ above, we will confirm the location with ▨▨▨ stakeholders and account for design changes. For all data fields being removed from the relationship page, we need to keep in mind that ▨▨ maintains a 1:1 relationship between the front-end form

fields in a ▨ and the database schema. Any form field additions/removals to an ▨ will require database schema changes and possible data backfill/migration effort.

Depending on policy, there are bi-directional data uniqueness properties that need to be maintained. The three proposed fields in this MVP should not have that constraint, so designing data input on the proposed ▨ should not require the duplicate relationship entries EA perceive on the current Relationship Page. This provides the opportunity to design intuitive data input, further enhancing the benefit of this effort.

Depending on the ▨ better suited to collect each removed field, we do not yet have a clear understanding of who within ▨ needs to be consulted. At a minimum, design and feasibility discussions will benefit from having people with QC, Training, Policy, and hands on EA experience and expertise. We would recommend assigning this work to a similarly composed, but much smaller, workgroup.

Potential impact: Improving the Relationships ▨ UX is estimated to save up to ▨ minutes for brand new application per worker, which would equate to 38 hours annually for EA assuming 450 applications per year.

Additional UX improvements to the page would create a more simplified process overall and EA experience for re-applications/re-determinations. Coupled with a responsive screen size, this would increase worker efficacy, ease of use, and satisfaction.

This recommendation was designed in partnership with and widely supported by front-line staff and regional directors, with 11 out of 11 participating staff supporting the recommendation.

Next steps: USDS proposes this work be championed by ▨ pending decision from ▨ with support from ▨

	Task	Owner	Completion Date	Others Involved
1	Design and prototype new page layout for Relationship page	▨	▨	▨
2	Design the Tax Status ▨ to capture the equivalent "Tax Dependent" data	▨	▨	▨
3	Design the Support and Maintenance ▨ to capture the equivalent "Provides Support For" data	▨	▨	▨
5	Design the Living Arrangements ▨ to capture the equivalent "Living Together" data	▨		▨	▨
6	Get policy/training/qc/etc. signoff	▨	▨	▨
7	Write epic for ▨	▨	▨	▨
8	Release management announcing changes	▨	▨	▨

9	Update training documents and/or Job Aides	TBD	12/1	Training

2. ▨▨ Driver Flows

Current state: Today, EAs have to navigate through many irrelevant screens and questions while processing a case in ▨▨ For example, for SNAP-only cases, EAs have to skip past ~1/3 of ▨▨▨▨▨▨▨▨▨ located throughout the flow. Further, the organization of screens in ▨▨ does not align with how EAs perform interviews or the ordering of the integrated benefits application. EAs also need to have deep knowledge of questions that are irrelevant for SNAP, even if they are processing SNAP-only cases. This leads to errors if they are not addressed and adds burden to EAs, particularly new EAs, who are less familiar with the layout of ▨▨ On average, new EAs may spend 60 minutes processing a SNAP case for a five-person household.

Proposed solution: ▨ and USDS identified the potential for creating new "driver flows", or the pathway an EA takes to complete an eligibility determination, to help decrease the number of screens and/or questions seen during the process. In order to explore the many ways in which driver flows could be changed, USDS suggests exploring a two-pronged approach.

1) A draft design pattern for showing questions/content based on benefits program. USDS will support efforts to design and test UX options to selectively show questions/content. This would allow the ▨ team to understand how EAs prefer to see information that is not related to the case they are working and determine which approach to take to remove questions from any given driver flow. Identifying the pattern for exclusively showing relevant questions would allow for replicability across the ▨▨ system and state programs. The USDS approach for this includes:

- Picking one page to test, such as the "Individual Page".
- Collecting the questions related to the page and tagging which relate to each program.
- Designing and usability testing multiple UX options, including: highlighting, icons, expandable buttons, graying out, and completely removing questions.
- Providing a recommendation for next steps based on testing.

2) A draft driver flow for a SNAP-only case at the ▨▨ level. USDS will support ▨ in outlining and testing the flow for a SNAP-only case, focused at the ▨▨ level. This would identify which whole sections could be skipped, saving EAs time clicking through unnecessary screens. The USDS suggested approach includes:

- Identify which ▨▨ pertain to SNAP.
- Review current ▨▨ capabilities and design.
- Draft a driver flow with ▨▨ that pertain to SNAP.
- Conduct usability testing with EAs to collect feedback on driver flow.

- Provide a recommendation for next steps based on testing.

USDS recommends completing usability studies following the development of medium fidelity mock-ups on the proposed approaches with EAs to measure the estimated impact of improving the ▓▓ workflow. For scoping the MVP, ▓▓ should be engaged in this discovery period to understand the full spectrum of ▓▓ questions/content across screens and feasibility of our approaches.

While testing and designing the new driver flows, it's important to keep in mind:

- Existing system defect when validating fields per specific programs.
  - ▓▓ currently require all form fields to be validated regardless of which programs the applicant is applying for.
  - As a workaround, EAs currently enter in bad/placeholder data to get the form to validate.
  - If planning to hide fields within the ▓▓ based on the programs applied for, this needs to be resolved; otherwise, the EA will be unable to successfully submit the subset of fields needed for specific programs.
- Technical implications and LOE of updating the UI.
- Policy input on design choices.

Potential impact: Estimated 75 hours per EA annually based on a time saving of 10 minutes per SNAP application. Additionally, there are other areas this project could impact:

- Increased efficiency
  - Reducing total time to process SNAP cases
  - Policy team also supported the idea that this would save time when performing QC tasks (estimate: TBD)
- Increased worker satisfaction
  - Positive feedback and comments related to the change

Additionally, this recommendation was designed in partnership with and widely supported by front-line staff and regional directors, with 10 out of 11 participating staff supporting the recommendation.

Next steps: USDS proposes this work be championed by ▓▓ team member and ▓▓▓ pending decision from ▓▓▓ and supported by ▓▓▓▓▓▓▓

	Task	Owner	Completion Date	Others Involved
1	Collect list of ▓▓ related to SNAP	▓▓▓▓	▓▓	▓▓
2	Decide on focus page for SNAP question testing	▓▓	▓▓	▓▓

3	Identify fields outside SNAP ▨▨ that are required to be filled but don't pertain to SNAP	▨▨▨▨	▨▨	▨▨▨▨
4	Review ▨▨ flow	▨▨▨▨	▨▨	▨▨▨▨
5	Collect questions on focus page for testing	▨▨▨	▨▨	▨▨
6	Tagging questions by program for focus page	▨▨	▨▨▨▨	▨▨▨
7	Design question patterns for focus page	▨▨		
8	Design SNAP-only driver flow	▨▨		
9	Design usability testing approach			
10	Conduct usability testing			
11	Report out on findings			
12	Make decision on next steps			

3. Auto-Create ▨▨▨ task for overdue ▨▨▨▨▨▨▨ tasks

Current state: Currently ▨▨▨▨▨▨ tasks within ▨▨ that have passed the initial 30-day case due date are incorrectly escalated into the ▨▨▨ Report and into the ▨▨ track queue for EA work, even though no action can be taken until the following day. This results in a large burden on not only the EAs, but also the ▨▨▨ supervisors who have to perform manual reconciliation and triage on the task each time it is left hanging with the ▨▨▨▨▨ ▨▨▨ status. This results in a task being redundantly triaged 3 separate times:

1. When the initial case due date, which is 30 days after the initial app submission, has occurred.
2. On the 10th day following the initial due date, where the task must be marked as ▨▨ ▨▨▨▨▨ due to the fact that a client has until the end of the 10th day to submit the requested information.
3. Finally, on the 11th day, when the task can finally be populated into ▨▨ and closed if there was no information received from the client.

The second appearance of the task causes massive volume and burden on both EAs and regional supervisors in charge of handling the ▨▨▨▨▨▨▨ Report. The EAs who work within the blue track (over 2_3 of all EAs) are spending over 1 hour per day to perform inquiry and mark these 10th day ▨▨ tasks with ▨▨▨▨▨▨ The ▨▨▨ supervisors are spending anywhere from 2-5 hours per day per employee, to address these 10th day ▨▨ tasks, due to the fact that they appear in the ▨▨ report because they do not have an associated ▨▨▨ task at that point.

Proposal: In the near-term, USDS and TX recommends the following:

- Implementation of new lo ic:
  - When a ▓▓▓▓▓▓ task occurs outside of the 30-day initial case deadline wait until the early morning on the 11th day to check if there is an ▓ ▓▓▓▓ task for the associated case.
  - If there is not an associated ▓▓▓▓ task within ▓ after the deadline, automatically generate a linked ▓▓ task for the ▓▓▓▓▓▓ task.
    - This is the task in which information was requested from the client and not received by the initial case deadline, which means the application should be denied.
- Provide training to EAs about the change in process. Also ensure clear communication regarding how the should see a drastic decrease, if not complete elimination, of the blue track ▓▓▓▓▓▓ tasks.
- Communicate and rovide training resources to all regional supervisors and any others who manage the ▓▓ data reconciliation report on this change.
- Gather 'before' and 'after' metrics and data on the volume of these tasks, both on their blue track appearance and the ▓▓ report occurrences to evaluate and measure impact.

In the medium term, USDS recommends the following:

- Evaluating what the reconciliation tasks in the ▓▓ report remain after implementing the change as well as the blue track tasks.
  - From this evaluation, determine a strategy for addressin these outstanding task types to reach the goal of complete elimination of the ▓▓ report.
- Perform analysis on the special holding queue tasks that appear after the implementation and determine what types of tasks, if any should be placed in this queue moving forward.
  - It may be that there are certain edge case tasks that will still require a special holding queue, but if it is found that there e similar implementations that can be performed on these tasks, the removal of the queue entirely should be considered.
- Investigate potential similar issues within other program types (such as ▓▓) and if found, replicate the implementation across applicable programs.

Potential impact:

- Decreased ▓▓ track workload by over 1 hour a day, or over 250 hours annually per EA
- Increased EA morale and retention, due to time savings that can be used for development or more en a ing case work
- Significant reduction in ▓▓ track volume for each re ion
- Significant (over 50%) reduction in dail ▓▓▓▓▓▓ tasks for each region/office
- Time savings of 20 hours per week per ▓▓▓ supervisor, or 1000 hours per supervisor annually
- Increased supervisor morale due to time savings that can be used for development or more engaging work

Additionally, this recommendation is widely supported by front-line staff and ▓▓▓ directors, with 11 out of 11 participating staff enthusiastically supporting the recommendation. ▓▓▓ leadership estimated that implementing this recommendation alone may achieve the increase in 10% SNAP application processing timeliness North Star Goal.

Next steps: USDS ⬛ro⬛oses this work be cham⬛ioned b ███████████ pending decision from ███ with support from ████████

	Task	Owner	██████	Others Involved
1	Meet with ██████ team to evaluate implementation	████████	██	████████
2	Scope implementation components and testing/roll-out strategy	██████	██	██████████
3	Design architecture flow and system process	██████	██	██
5	Review implementation plan with policy and other stakeholders for review	████████	██	██
6	Implement engineering solution and roll-out	██████	██	██
7	Roll out communications to EAs and ██ thanking and updating them of the change	████████		████████
8	Collect and monitor post-deployment data to validate the impact of this work	██████		████████

███ Led Initiatives - USDS Available to Advise Upon Request

4. Improve usability of ███ to reduce inquiry burden

Current state: EAs are expected to clear all tasks associated with a case. As a result, prior to processing a task, EAs must perform a process called ███ wherein they are required to search across multiple disparate systems for related tasks and relevant case information. For EAs, performing inquiry across multiple systems is a bespoke "guess and check" process as there is no single reliable unique identifier available to search across systems and frequently related tasks are not always associated to the same case.

EAs report that the inquiry process typically takes tenured EAs an average of 10-15 minutes per case and up to 1 hour for newer EAs. As a result, EAs spend hours each week trying to find the materials they need before they can begin processing a task.

Proposed solution: USDS recommends designing and piloting an improved UI in ███ where EAs can access both ███ and ██ tasks and relevant case information into a single view for EAs.

Potential impact: Up to 15 minutes per EA per case for tenured EAs and up to 1 hour for newer EAs; 112 hours saved per tenured EA annually and up to 450 hours saved per new EA annually.

Additionally, this recommendation was designed in partnership with and widely supported by front-line staff and regional directors, with 10 out of 11 participating staff supporting the recommendation.

Next steps: If ▨▨▨ is interested in engaging USDS on support on this work, additional discussion is required.

5. Improve bundling in ▨▨ and ▨▨

Current State: If an EA ever fails to mark a task as complete in ▨▨ when they complete that task, that task lingers in the system as an "orphaned" task, impacting downstream metrics and requiring work through reconciliation to correct this issue. There are two main reasons why an EA may erroneously not mark a task as complete in ▨▨

The current workflow for EAs to process tasks begins with them claiming a task through ▨▨▨ which will assign them an ▨▨ task along with any bundled ▨▨ tasks. The EA then proceeds to the state portal where they check ▨▨ for the equivalent ▨▨ task, along with any bundled ▨▨ tasks. At this point EAs may spend time assigning additional ▨▨ tasks to themselves if those tasks are relevant to the current case. This stage of the process can be prone to error because there is no exhaustive way to discover all the tasks in ▨▨ that might be relevant to a case, and therefore all undiscovered tasks will not be closed along with the correct associated task. Additionally, when an EA disposes that case at the end of their workflow, they may erroneously leave tasks open.

▨▨▨ and ▨▨ currently only interface with each other in a limited capacity, and without an API for keeping tasks in sync.

Proposal: These two major root causes of orphaned tasks will need to be solved in two related ways. First, improving the logic in ▨▨ to associate tasks to each other will help to minimize the frequency of tasks remaining undiscovered in ▨▨. Next, synchronization between ▨▨▨ and ▨▨ will consolidate all the tasks in ▨▨▨ so that EAs can see and properly action all associated tasks in one place. Synchronization between ▨▨▨ and ▨▨ will require a dedicated API between the two systems.

Impact: Improving the bundling logic in ▨▨ will reduce the amount of time EAs spend searching for associated tasks which we have estimated to be up to 15 minutes of time saved for an experienced EA, and up to one full hour for a newer EA. This equates to over 112 hours saved for experienced EAs and 450 hours saved for new EAs, every year. The implementation of the API will consolidate functionality, increasing the ease and clarity of the EA workflow, but we don't anticipate the API to directly save EA time.

Next steps: USDS will work with ▨▨▨▨ to define the scope of increased bundling in ▨▨ and the APIs between ▨▨▨ and ▨▨

6. Implement autosave functionality across ███ and remove non-required system timeouts

Current state: Currently, timeouts occur approximately every 35 minutes across the ███ system without warning. When timeouts happen, EAs report that it commonly results in losing hours of work per week.

Furthermore, the only manual "Save" button across ███ appears on the Relationships ███ This button requires EAs to continually scroll up to the top of the screen in order to manually save their work while they work on completing the Relationships table "below the fold." Additionally, EAs report that the Individuals ███ is a commonly time intensive section to complete where they commonly also experience timeouts.

Furthermore, the most recent NIST and MARS-E guidance allows for sessions locks to be implemented by a screen saver at the 15-minute mark, making application-level timeouts redundant from a federal compliance perspective.

Proposed Solution: USDS recommends implementing automatic saving every 1 minute across the ███ system to ensure that caseworkers do not inadvertently lose their work upon system timeouts. Additionally, removing application-level timeouts from EA systems will also help to mitigate this issue.

Potential Impact: Up to 4 hours per EA per week; 200 hours per EA annually. Additionally, this recommendation is widely supported by front-line staff and regional directors, with 11 out of 11 participating staff enthusiastically supporting the recommendation.

Next steps: ████████ leadership expressed interest in USDS consulting on how other states have implemented similar functionality. However, implementation will be wholly implemented by the ███ team. ███ leadership estimates that both the auto-save functionality and removal of non-required system timeouts can be implemented in no more than 1-2 development cycles (5-10 weeks).

However, prior to ███ implementation on the removal of non-required system timeouts, sign-off on proposed solutions is required by ██████

7. Implement responsive screen sizing in ███ so all questions are viewable without horizontal scrolling

Current state: Currently EAs are not able to see all questions clearly on the page as the design and implementation of ███ is fixed at a maximum width rather than responsive to different screen sizes. This results in unnecessary burden for EAs in requiring them to horizontally scroll

back and forth to view all required questions. This is particularly problematic across the relationship page.

Proposed solution: USDS recommends implementing a responsive design across all ▓▓▓ pages so that EAs are able to clearly view every question clearly. This would allow the ▓▓▓ interface to scale to match the relative screen width of the monitor being used, and should match the screen width for devices from laptops all the way up to large widescreen external monitors.

Potential impact: Up to 4 hours per EA per week; 200 hours per EA annually. Additionally, this recommendation is widely supported by front-line staff and ▓▓▓▓ directors, with 7 out of 11 participating staff supporting the recommendation. This additional screen width would also unlock additional layout and user experience possibilities for recommendations #1 and #2 above.

Next steps: ▓▓▓▓▓ IT SSA will work to identify the best path forward. USDS, based on feedback received during the onsite, believes this could be implemented in 1-2 development cycles (5-10 weeks). USDS also suggests leveraging the ▓▓▓▓▓▓▓▓▓▓▓▓ process to implement this as quickly as possible.