

Smarter Screening for Public Benefits

[New York City Mayor's Office of Economic Opportunity | [Design Team]

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Keywords:

Eligibility screener, user experience, content design

Summary:

The New York City Mayor's Office of Economic Opportunity (NYCO) identified that a significant percentage of users do not complete the ACCESS eligibility screener. This raised the question: How might we better engage and support vulnerable and low-income New Yorkers in accessing the benefits they qualify for?

To help improve completion rates, Vannessa led three rounds of usability testing and implemented major design and copy iterations. Her focus was on simplifying input fields and reducing the perceived length and complexity of the screener.

SMARTER SCREENING FOR PUBLIC BENEFITS

New York City Mayor's Office of Economic Opportunity

City of New York, NY

Jaylene Rubio - Senior Product Designer

coding it forward >

NYC

VANNESSA WONG

Cornell University
Information Science

HIYA, I'M VANNESSA!

Role: Product Design intern
Project: ACCESS NYC

Graduated with a BA in
Information Science 2025
at Cornell University



WHAT'S NYCO?

NYCO is short for New York City Mayor's Office of Economic Opportunity. This city office focuses on leveraging innovation, research and technology to better serve New Yorkers in poverty.

NYC



WHAT'S THIS SCREENER?

ACCESS NYC is the front door for New Yorkers to screen for benefit and program eligibility, learn how to apply, gather required documents, and find local help.

The current screener is 10 steps long, and utilizes dropdown menus and type to input simple to complicated households.

NYC



THE ORIGINAL 2017 SCREENER

HEURISTIC EVALUATIONS (HE)

- **HE identifies problems in a user interface that impacts user experiences (Jakob Nielsen)**
- In this example, jargon in the income types list compromises a user's ability to get accurate screener results if they misunderstand the names.

Do they have an income?

This includes money from jobs, alimony, investments or gifts.

✓ Click to add an income type

- wages, salaries, tips
- self-employment income
- unemployment benefits
- Cash Assistance grant
- child support (received)
- disability-related Medicaid
- Supplemental Security Income (SSI)
- Social Security Dependent Benefits
- Social Security Disability Benefits
- Social Security Survivor's Benefits
- Social Security Retirement Benefits
- New York State Disability Benefits
- Veteran's Pension or Benefits
- Government or Private Pension
- Withdrawals from Deferred Compensation (IRA, Keogh, etc.)
- Worker's Compensation
- alimony (received)
- boarder or lodger
- gifts/contributions (received)
- rental income
- investment income (interest, dividends, and profit from selling stocks)

The more you include, the more accurate your

and heating bills.

HEURISTIC EVALUATIONS CONT.

- In this example, a lack of a button conflicts with user control because users cannot change their answers whenever they need to.

Step 8 of 10

Tell us about the head of the household.

Are you the head of the household?

i This is what the head of household means.

☒ Yes ☐ No

Continue ▶

PROJECT CONTEXT

- How might we **increase screener completion?**
- Users: New Yorkers from all backgrounds seeking help for themselves or on behalf of others looking to get help with applying to benefits programs
- Scope: Ideate on cash flow inputs and household composition workflows



PROJECT GOALS

Goal: Let's increase screener completions by improving the screener UX. How?

I'll *address* user interface bugs found from the HE

I'll *reform* the UX to make the screener more intuitive



CASH FLOW INPUT ITERATIONS

5. Income

Do you receive **work income**?

Work income includes money that you earn from wages, salary, or self-employment.

Yes

No

Do you receive **government income**?

Government income includes any money that you receive from government benefits.

Yes

No

Do you receive **retirement or alimony income**?

Retirement or alimony income includes money from social security or court-approved cases.

Yes

No

Do you receive **investments or property income**?

Investments or property income includes money from any property, stocks, or capital you own.

5. Income

What types of **government income** do you receive?

Select all that apply.

☐ Unemployment benefits

☐ Cash Assistance grants

☐ Child support

☐ Disability-related benefits

☐ Supplemental Security Income (SSI)

☐ New York State Disability Benefits

☐ Veteran's Pension or Benefits

☐ Government or Private Pension

5. Income

What types of **government income** do you receive?

Select all that apply.

☐ Unemployment benefits

☐ Cash Assistance grants

☐ Child support

☐ Disability-related benefits

☐ Supplemental Security Income (SSI)

☐ New York State Disability Benefits

☒ Veteran's Pension or Benefits

☐ Government or Private Pension

How much do you earn from **Veteran's Pension or Benefits**?

Dollar Value

\$00.00

Frequency

Select

Back

Next

CASH FLOW INPUT ITERATIONS

Part 5 of 8

5. Income

What types of income do you get?
Select all that apply.

Work income

☐ Paychecks and tips

☐ Worker's compensation

☐ Unemployment benefits

☐ Self-employment income

Government benefits

☐ Veterans pension

☐ Medicaid for disability

Part 5 of 8

5. Income

How much and how often do you get:

Unemployment benefits?

Amount
\$800.00

Frequency
Select

Social Security Disability Insurance (SSDI)?

Amount
\$500.00

Frequency
Select

Back

Next

66% completed

HOUSEHOLD COMPOSITION ITERATIONS

7. Household

How many people live in your household?

Include everyone who lives in the same home, especially if you buy and prepare food together.

Number of people (max. 8)

What is your current housing situation?

Select all that apply.

☐ Renting

☐ Staying with a friend

☐ In a shelter or without housing

☐ In a hotel

☐ Own my home

You as a household member owns the home.


7. Household

How many people live in your household?

Include everyone who lives in the same home, especially if you buy and prepare food together.

Number of people (max. 8)

 yourself (25)


Member #2

Age

25

Relationship

Sister

Age

75

8. Household Details

Who is the head of the household?

This is the person who pays most of the family's expenses. If you pay more than half the cost for your home this year, you are the head of household.

☐ yourself (21)

☐ your sister (25)

☐ your grandfather (75)

Does anyone receive Medicaid?

☐ yourself (21)

☐ your sister (25)

☐ your grandfather (75)

☐ None of the above

Does anyone receive disability-related Medicaid?


☐ yourself (21)


HOUSEHOLD COMPOSITION ITERATIONS


Part 7 of 8

7. Household

Tell us more about your household.

 You, 19 [Edit](#) [Remove](#)

 Mother, 53 [Edit](#) [Remove](#)

 Household member [Edit](#) [Remove](#)

Age / Relationship

Which of the following describes them?
Select all that apply.

☐ They are a student.

☐ They are disabled.

☐ They are pregnant.

☐ They are unemployed.

☐ They get Medicaid.

☐ They get Medicaid for disability.

☐ They are blind or have vision loss.

They are a veteran or currently serve in

Part 7 of 8

7. Household

Who is the head of household?
This is whoever pays most of the household bills and expenses.

☐ You, 19

☐ Mother, 53

☐ Father, 53

[Back](#) [Next](#)

HOUSEHOLD COMPOSITION ITERATIONS

Part 5 of 8

5. Income

What types of income do you get?
Select all that apply.

Work income

- ☐ Paychecks and tips
- ☐ Worker's compensation
- ☐ Unemployment benefits
- ☐ Self-employment income

Government benefits

- ☐ Veterans pension
- ☐ Medicaid for disability



Part 8 of 8

8. Household Details

What's your housing situation?
This helps us find housing programs you may qualify for.

- ☐ I rent my home.
- ☐ I'm in a shelter.
- ☐ I'm staying in a hotel.
- ☐ I'm staying with family or friends.
- ☐ I or someone else I live with owns my home.
- ☐ I'd rather not say.



Part 8 of 8

8. Household Details

After bills, how much money do you have available?
Include cash and money in bank accounts.

Amount
Select ▼

[Back](#) [Next](#)

97% completed

cif>

LOREM IPSUM-ISMS

- I had assumed that to save resources, I would use placeholder text to expedite testing.
- But UX is a **holistic view** of both copy *and* design-you can't test one thing without the other

Part 7 of 8

7. Household

List all of your expense frequencies to continue.

How much do you pay for **rent**?

Amount / Frequency

How much do you pay for **utilities**?

Amount / Frequency

75% completed

Part 5 of 8

7. Household

How much and how often do you pay for:

Rent?

Amount / Frequency

Utilities?

Amount / Frequency

75% completed

LOREM IPSUM-ISMS EXAMPLE

Part 4 of 8

4. About you

Tell us about yourself.

How old are you and what is your zip code?

Age / Zip Code

Which of the following describes you?

Select all that apply.

☒ You are a student.

☐ You are disabled.

Part 4 of 8

4. About you

Tell us about yourself.

We need your age to find as many specific programs as possible. We need your zip code to find local benefit programs.

Age / Zip Code

Which of the following describes you?

Select all that apply.

☒ You are a student.

THE NEW 2025 REDESIGN

THE NEW 2025 REDESIGN

A very big thank you to my team at NYCO: Jaylene, Jasmine, Julianna and Unnati as well as Sophia, Jack, Sourabh, Darnell!

People rated the new screener an average of

4.25/5

suggesting that participants found the prototype relatively easy to use (though terminology confusions remain)

A majority of users rated the new design flow to be a

4/5

throughout all rounds of testing

100%

Of users valued the back button to fix issues/mistakes they made

NEXT STEPS

- Ideally, if I were to stay on the team, I'd:
- Have conversations with NYCO to see needs of the redesign and adjust as necessary
 - Continue ideating on edit/removing members in the household composition as well as a review page for the screener
 - Discuss how progress bar numbers will look like for the whole screener (not just household parts)
 - The A-Team will have more conversations about feasibility
- Handoff work to and test different versions of copy

TAKEAWAYS

Optimize your workspace

- Self advocate in the fast-paced environment
- Take initiative in meetings
- Ask clarify questions early

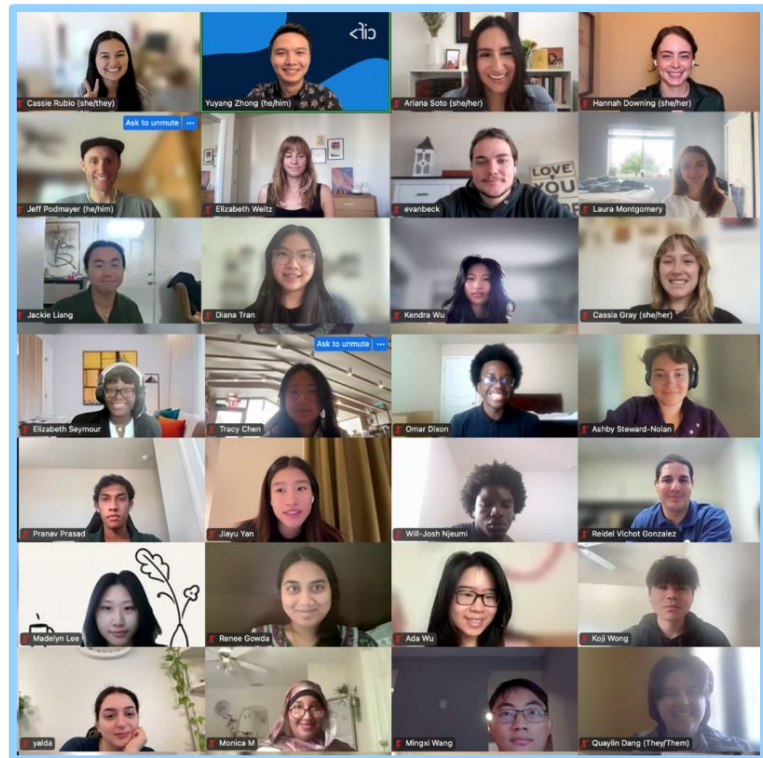
Design critique etiquette

- Scaffolding/filtering feedback
- Trust yourself to be the expert

REFLECTION

CIF's weekly talks and mentor meetings helped me get footing in civic tech and learn more about this overlooked sector.

Working on products that directly give back is what feels most fulfilling to me—and is a value I'll carry for my future work.





THANK YOU!

And a very special thanks to my mentor Irene, to every professional and speaker who visited us every Tuesday and to our fellowship supervisors Cassie and Yuyang!