

1095-B TAX DOCUMENT

# Sprint 1 Demo

Tuesday, February 8th, 2022

# Get to know the team

## Core team

### PRODUCT



**Ashley Castillo**  
Washington DC  
Product  
Manager Lead



**Jordan White**  
Dallas, TX  
Product Manager



**Tami Corson**  
North Carolina  
Scrum Master

### ENGINEERING



**Nadya Primak**  
Washington DC  
Engineer

## Executive team



**Jeff Scheire**  
MO Studio



**Marcy Jacobs**  
McKinsey



**Kevin London**  
frog

### DESIGN



**Kit Casey**  
Boston, MA  
Design Director



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



**Grace Hong**  
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Experience  
Designer



**James Lewis**  
Austin, TX  
Accessibility and  
UX Research Lead



**Will Reynolds**  
Serve



**Ben Morris**  
Pluribus

## WELCOME TO THE SPRINT 1 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



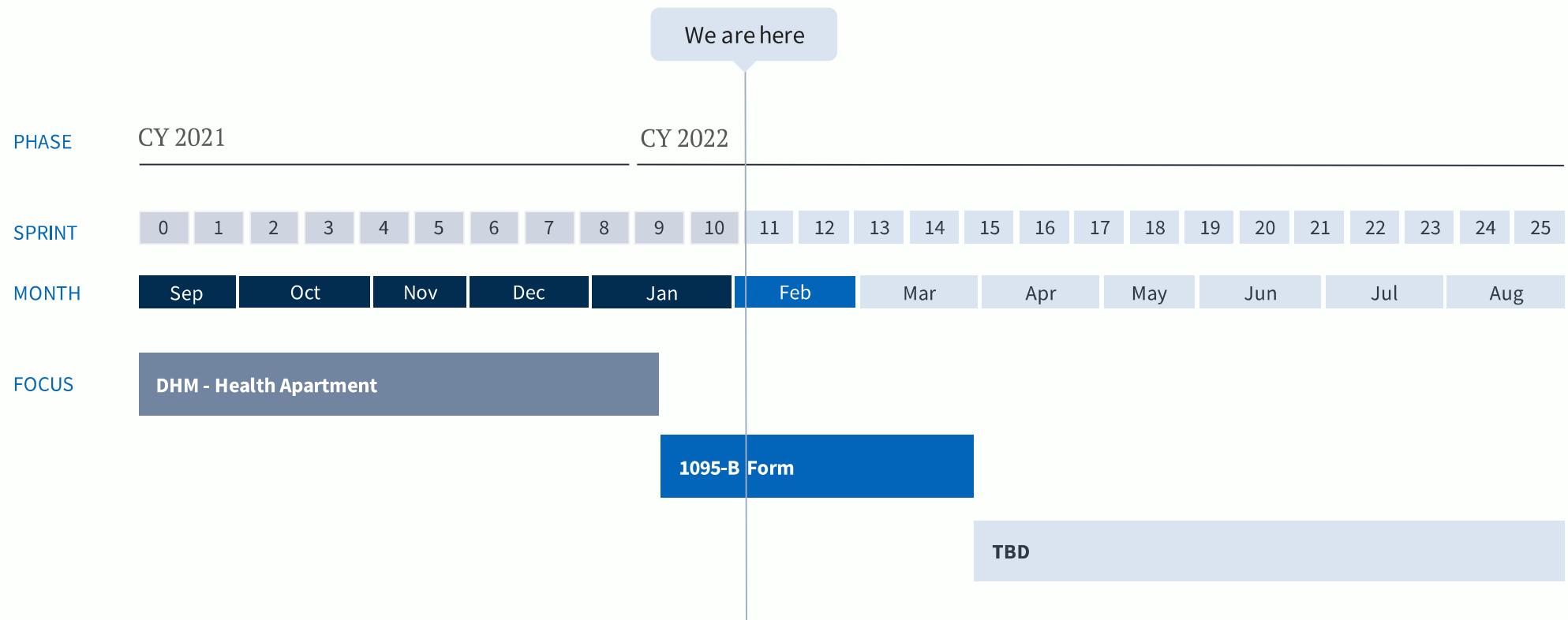
**2** To get feedback and insights early and often



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



# Roadmap Overview



SPRINT 1 DEMO

# 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

Goal: April 1<sup>st</sup> MVP Launch



# 1095-B Project Status & Workplan

◆ Owned by design team

◆ Owned by product/engineering team

◆ Release

We are here										
	Sprint 0	Sprint 1		Sprint 2		Sprint 3		Sprint 4		Sprint 5
Product & Delivery	Week 1: 01/20 – 01/26	Week 2: 01/26– 02/02	Week 3: 02/02 – 02/09	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
	Build backlog			Identify Change Management or Communications Plan			Handover plan - Prepare for launch			
	PIV Onboarding		Prioritized backlog							
User Experience & Design	Immersion & onboarding	Testing prep		● Voice of Veteran	Testing prep & recruiting	● Voice of Veteran			Create post-MVP design refinements	
	PIV Onboarding	Wireframes & Design		Design iterations		Design iterations		Design QA		
		User flows								
Engineering & Development	Create tech discovery plan	Data discovery		POC for data flow						
	Immersion & onboarding	Define data flows - Systems mapping		Build solution (form UI, data connections, storage, etc.)				UAT	Test & Refine	
Collaboration Cycle		Kickoff ◆◆ Research Plan Review	Analytics Review ◆◆ Design Intent	◆◆ Research Plan Review #2 (wireframes)	◆◆ Midpoint Review	◆◆ Contact Center Review	◆◆ Privacy & Security review	◆◆ Staging Review	◆◆ MVP Launch	

\*Does not show Validate phase meetings in Collaboration Cycle, such as Full Accessibility Audit and Post-Launch Check In

SPRINT 1 DEMO

# Sprint 1

# Agenda for today's Demo

**Sprint Goal:** Sprint 1 was focused on discovery to understand the current state and draft out what would be in the future state and how we would build it

## User Story

 Focus for today's demo

### 1 PRODUCT

- A. Conduct product discovery through stakeholder interviews to pull insights
- B. Draft product outline
- C. Draft prioritized backlog for MVP and post-MVP enhancements

### 2 DESIGN

- A. Draft the user flow and decision paths of how a Veteran would access the form
- B. Illustrate key moments in the Veteran happy path for future state
- C. Write content for 1095-B pages
- D. Prepare for user research by creating the documentation needed to conduct research

### 3 TECH

- A. Conduct data discovery to understand where the data sits and what systems house the data we need
- B. Map out how the data flows through the systems in current state and how we would pull it in future state

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

1 PRODUCT

# We met with 5 stakeholders throughout Sprint 1 to get a baseline of the current state

User Story: Conduct product discovery through stakeholder interviews to pull insights

STAKEHOLDER	MEETING DATE	KEY TAKEAWAYS (NOT EXHAUSTIVE)
Tarsha Tremble – 1095-B Business Owner	1/25/22	<ul style="list-style-type: none"><li>▪ Data sits in enrollment system</li><li>▪ The data is sent to a print vendor, who creates a PDF, prints it to send to Veterans, and sends the PDF back to the VA</li><li>▪ Currently, a Veteran can call the enrollment center to fix a mistake. The print vendor can then print and send a corrected form</li></ul>
Jason Woodman – Contact Center	1/31/22	<ul style="list-style-type: none"><li>▪ There are three escalation tiers for problems. Tier 1 answers simple questions, Tier 2 takes more complex escalations, and Tier 3 requires specialized knowledge of the backend</li><li>▪ The product guide and video can help guide Tier 1 and Tier 2 in supporting the Veteran when they call in for questions</li></ul>
Matt Self – Forms and Letters	2/1/22	<ul style="list-style-type: none"><li>▪ Forms typically refers to a document that intakes data, whereas Letters is a document the VA gives to the Veteran as a record</li><li>▪ Therefore, 1095-B form might fit better in "Letters" than "VA Forms", as the form is already filled out</li></ul>
Joshua Falkner (OI&T), George Tidwell (Informatics)	2/2/22	<ul style="list-style-type: none"><li>▪ Cleared path for creating the 1095-B PDF while helping eliminate options we were previously considering</li><li>▪ Print vendor has 10 days to submit the PDFs back to the VA</li><li>▪ Current data in the enrollment system wouldn't be representative of what was sent to the print vendor</li><li>▪ We would get a new data file if the Veteran makes a correction on their form</li><li>▪ We can retrieve flat file of data sent to print vendor from enrollment system via batch script for processing into PDF</li></ul>

## 1 PRODUCT

# From what we learned, we built the product outline for our long term product vision

User Story: Draft product outline

## DESIRED OUTCOMES:

As a Veteran, I...

- Can easily access my 1095-B form while logged into my VA.gov account
- Know how to address an error on the form
- Can choose to no longer receive a physical copy of the form in the mail

The screenshot shows a product outline document titled "1095-B Tax Form Product Outline". The document is structured with sections: Overview, Problem Statement, Desired User Outcomes, and Desired Business Outcomes. The "Overview" section contains a brief description of the form's purpose. The "Problem Statement" section lists challenges like high mailing costs and difficulty replacing lost forms. The "Desired User Outcomes" section reiterates the user story from the previous slide. The "Desired Business Outcomes" section lists benefits such as increased satisfaction and cost reduction.

1095-B Tax Form Product Outline

### Overview

Form 1095-B reports the months a person had qualifying minimum health coverage to the IRS. The VA sends this form to Veterans to show what months they were covered under the VA healthcare system. In most cases, it is simply a form for one's records. However, some states still have an individual coverage mandate, and in those states, the form is necessary for filing taxes.

### Problem Statement

Currently, form 1095-B is mailed to veterans. Sending it out costs the VA approximately \$1.5 million, and an additional \$400,000 if they have to re-send it due to an error on the form. What's more, the form isn't available online, so if a Veteran loses the form, they have no easy way to get a replacement.

- How might we make the digital form easily accessible to Veterans?
- How might we provide Veterans a clear escalation path if there's an error on the form?
- How might we let Veterans choose whether to keep receiving a physical form?

### Desired User Outcomes

As a Veteran, I:

- Can easily access my 1095-B form while logged into my VA.gov account
- Know how to address an error on the form
- Can choose to no longer receive a physical copy of the form in the mail

### Desired Business Outcomes

- Increased satisfaction with VA digital experience
- Decreased cost of sending physical mail

[Product Outline Link](#)

## 1 PRODUCT

# We aligned on what features would fall into MVP and what would likely be post-MVP

User Story: Draft prioritized backlog for MVP and post-MVP enhancements. *Features and MVP alignment pending validation from user research.*

	FIND THE FORM	ACCESS THE FORM (UNAUTHENTICATED)	ACCESS THE FORM (AUTENTICATED)	GET HELP
<b>Must Do (MVP)</b>	<ul style="list-style-type: none"><li>As a Veteran, I want to easily find the form through Google so that I can find it through my normal methods</li><li>As a Veteran, I want to quickly navigate to my form once I log in</li><li>As a Veteran, I want to use VA.gov Search functionality to easily find my form</li></ul>	<ul style="list-style-type: none"><li>As a Veteran, I want to learn about the form, so that I know whether or not I need to log in and download it</li><li>As a Veteran, if I'm not logged in, I want to be redirected to login to be able to download the form</li></ul>	<ul style="list-style-type: none"><li>As a Veteran, I want to understand what the form is so that I know what to do with it</li><li>As a Veteran, I want to download my form so that I can have it for my records</li></ul>	<ul style="list-style-type: none"><li>As a Veteran, I want to fix a mistake in my form to avoid any issues with my taxes</li><li>As a Veteran, I want to ask a question about the form so that I understand what to do</li></ul>
<b>Should Do (Fast Follow, Post MVP)</b>	<ul style="list-style-type: none"><li>As a Veteran, I want to be informed that the form is now available online so that I am aware of the form's new "home"</li></ul>		<ul style="list-style-type: none"><li>As a Veteran, I want to opt out of getting mailed the form so that I no longer receive a mailed form unless I specifically ask for it</li></ul>	<ul style="list-style-type: none"><li>As a Veteran, I want to know how long it will take for my form to be updated (expected wait time) and confirmation when it's done, so I don't have to update it again</li></ul>
<b>Could Do (For consideration Post MVP)</b>			<ul style="list-style-type: none"><li>As a Veteran, I want to view the form without downloading it so that I can easily see what my filled in form is</li></ul>	
<b>Would Do (Long Term Backlog)</b>				<ul style="list-style-type: none"><li>As a Veteran, I want to easily share my form via email so I can send it to myself or others straight from the site</li></ul>

## 1 PRODUCT

# We noted where we wanted to be able to track metrics on our MVP and Post MVP features

User Story: Draft prioritized backlog for MVP and post-MVP enhancements. *Metrics and MVP alignment pending validation from user research.*

	FIND THE FORM	ACCESS THE FORM	GET HELP
MVP	<ul style="list-style-type: none"><li>• Number of users who find the page through Google</li><li>• Number of users who search for the form on VA.gov</li><li>• Tracking navigation from entering VA.gov to getting to our page</li></ul>	<ul style="list-style-type: none"><li>• Number of users who land on the 1095-B page (page views)</li><li>• % of users who land on the form and download the form or choose to not download it</li><li>• When users typically visit the page (e.g., right before tax season or after)</li><li>• Number of users who get errors and cannot download the form and type of errors</li><li>• Repeat users (% of users who download multiple times)</li><li>• Number of users who land on the page authenticated vs. unauthenticated</li></ul>	None for MVP
Post MVP	<ul style="list-style-type: none"><li>• From which channels users accessed the page (social media link, newsletter link, etc.)</li><li>• Numbers of users who opt-in to online-only delivery</li><li>• Number of users who get redirected from other parts of VA.gov</li></ul>	<ul style="list-style-type: none"><li>• If we build view functionality. Number of clicks on "view" pdf instead of "download"</li><li>• Long term: Reduced cost for the VA to send the form by mail</li><li>• Number of addresses proactively updated prior to opting-in to paperless (right now the address associated with the form is not reflected to the user in any capacity)</li></ul>	<ul style="list-style-type: none"><li>• Number of calls to call center regarding 1095-B form information</li><li>• Number of calls to the call center regarding errors in 1095-B form</li><li>• Number of forms corrected (e.g., errors addressed)</li><li>• Time between correction and update</li><li>• Number of people who call to change their delivery method from digital to mail</li><li>• Number of people who use the Chatbot for help</li></ul>

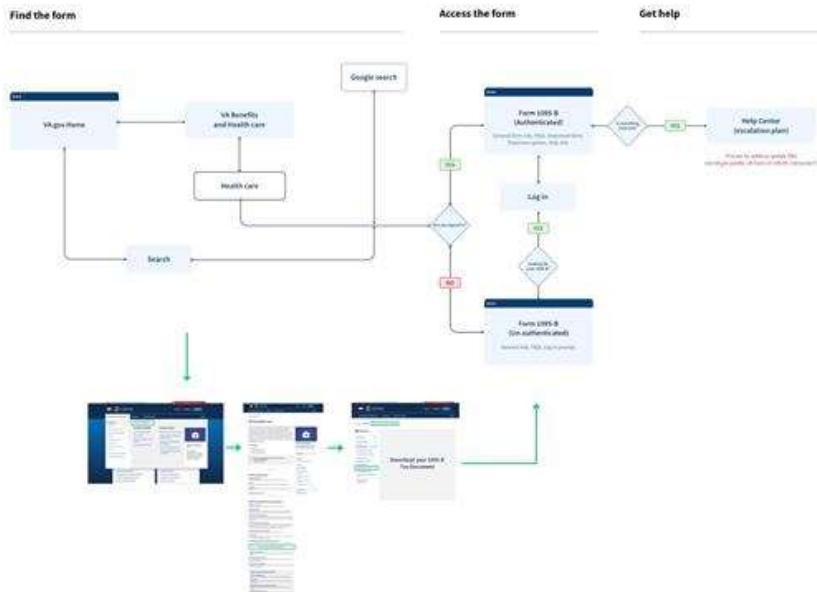
## 2 DESIGN

# With our product vision in mind, we created the flow of how a Veteran would find the form

User Story: Draft the user flow and decision paths of how a Veteran would access the form

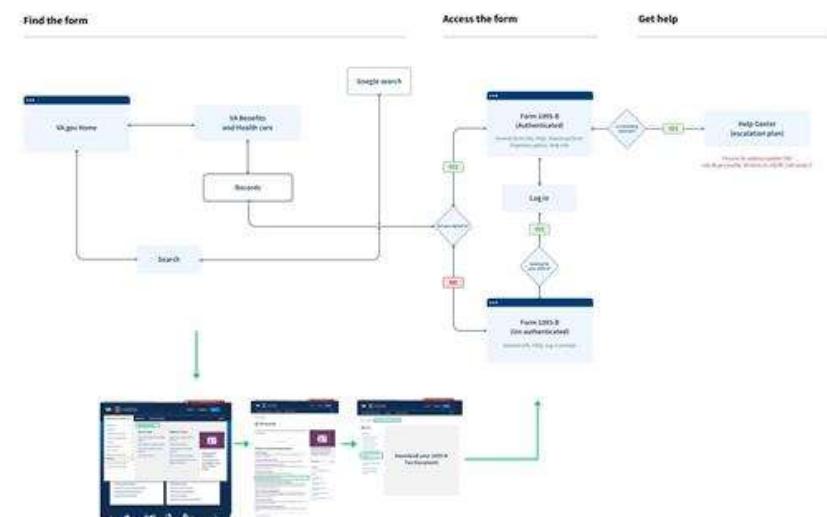
1095-B User flow, Health care path

This documents the happy path user flow (not always necessary to have someone go through all 10 flows)



1095-B User flow, Records path

This documents the happy path user flow (not always necessary to have someone go through all 10 flows)



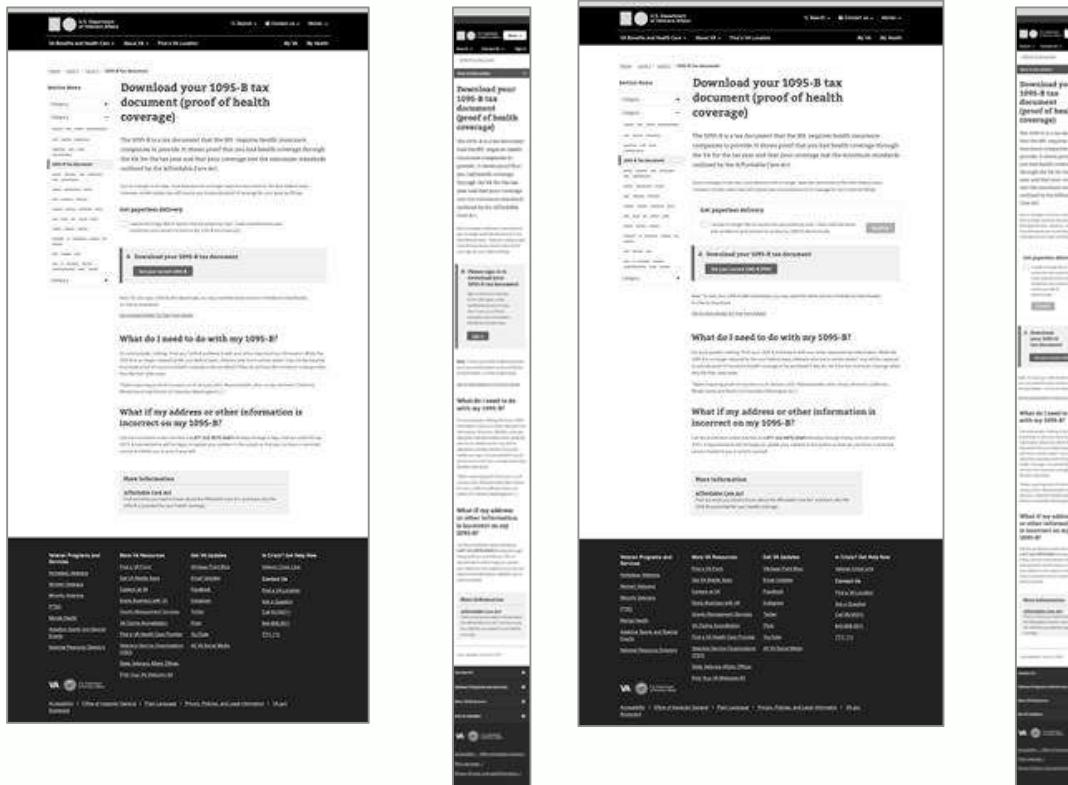
[User Flow \(Health Care Path\) Link](#)

[User Flow \(Records Path\) Link](#)

## 2 DESIGN

# We focused on the landing page and created our first draft of what the experience would look like

User Story: Illustrate key moments in the Veteran's happy path for future state to access and download the form



[Wireframes Link](#)

## 2 DESIGN

# We identified what other content we need to create beyond our landing page

User Story: Write content for 1095-B pages

Other areas that will need to be re-directed to our 1095-B page:

- Find forms
- ACA
- 1095-B cover letter\*
- Notifications (TBD)
- FAQs

\*This may need to be further updated based on MVP functionality and developments in paperless opt-out process.

**1095-B Content Needs**

DRAFT - formatting/planning to continue to be evolved. After assessment of project scope and current landscape, it has been determined that the following minimum content needs will have to be addressed.

**What's in scope for us**

1. Our Page (Net new pages we make)
  - Basic explanation of what 1095-B is and that it's your paper mailed form
  - FAQ we need to address:
    - How do I opt-in to receive this form electronically? (confirm policies around opt-in to stop mailing)

*Path forward:* Carl to write this content as first draft in Sprint 1. Carl to check if there is a copy review team (part of Platform Review)

2. Navigation & UX Depending on placement of form and access, we will need to develop copy for page navigation, CTAs and any descriptive copy.

*Path forward:* We make the recommendation to IA team (might be the Experience contact), part of Design Intent, Sprint 2 work.

3. Landing Page Updates (Currently Existing Pages that we need to change) Consider updating content on homepage and "find forms" to reference 1095-B or Tax documents. Existing content around The Affordable Care Act & 1095-B form need to be updated on VA.gov to reflect current laws, changes to how the VA is delivering the form and point users to how they can download the form online. Or, develop a plan for sunsetting old pages. Existing content can currently be found at:
  - <https://www.va.gov> (homepage)
    - Update quick links in records section to include tax documents?
    - Craft alert messaging?
  - <https://www.va.gov/find-forms>
    - Add an entry for the 1095 B; informational & FAQ as well as direct download in authenticated.
  - <https://www.va.gov/health-care/about-affordable-care-act>
  - <https://www.va.gov/health/aca/index.asp>
  - <https://www.va.gov/health/aca/EnrolledVeterans.asp>
  - <https://www.va.gov/health/aca/information-for-tax-season.asp>
    - Current content not updated since 2018
  - Letters

*Path forward:* - Design team to make a comprehensive list of everywhere across va.gov that could link back to us - Carl to write marketing callout of what the page could say to redirect back to us - Discuss with VA-PO on next steps of how we want to take it to these teams if desired - Sprint 3, 4 (after Contact Center Review)

## 2 DESIGN

# To validate what we are building, we prepared to begin user testing in the next sprint

User Story: Prepare for user research by creating the documentation needed to conduct research

## Research goals

- Better understand how Veterans might find, use, and edit a digital copy of the 1095-B form
- Discover needs, pain points and preferences for physical or digital delivery of the form
- Test usability of proposed solution

## Format

- Interview followed by a moderated usability testing session with a clickable prototype

## Participants

- 6-8 Participants who currently utilize VA healthcare as their primary insurance and 2 - 4 Participants who use primarily access healthcare outside the VA system
- Secondary criteria: Mix of users who file their taxes themselves (manually or software such as turbo tax), and those who use the services of a tax preparer or accountant
- Scheduled for Friday Feb 11 – Wed Feb 16

**1095-B Tax Document Conversation Guide**

**Intro**

Thanks for joining us today! My name is James and I also have some colleagues on the line observing and taking notes. Today we're going to talk about managing healthcare and tax documentation from the VA.

Before we start, a few things I want to mention:

- This entire session should take about 45 minutes. I want to be sure not to keep you much longer, so I may occasionally prompt you with the next question or topic.
- In this session, we want to hear your honest opinions. We are not testing your ability. We just want to improve these tools to better meet Veteran's needs. I will not be offended by any criticisms you have, and I welcome your feedback!

**Research Plan for Team MOVE, 1095-B tax form February 1, 2022**

**Background**

Currently, form 1095-B is mailed to Veterans. Sending it out costs the VA approximately \$1.5 million, and an additional \$400,000 if they have to re-send it due to an error on the form. What's more, the form isn't available online, so if a Veteran loses the form, they have no easy way to get an immediate replacement.

[Link to product brief](#)

**OCTO Objectives**

[See reference here](#)

This project supports the OCTO goals of "Logged-in users can update their personal information easily and instantly", and "Veterans and their families can find a single, authoritative source of information."

**Veteran Journey**

[See Reference Here](#)

Phase 2: Living Civilian Life Life Stage: Putting down roots

Moment: Engaging VA to access benefits and services

# After data discovery and exploring multiple options of how to build the form, we landed on one path forward

User Story: Conduct data discovery to understand where the data sits and what systems house the data we need

 Recommended option

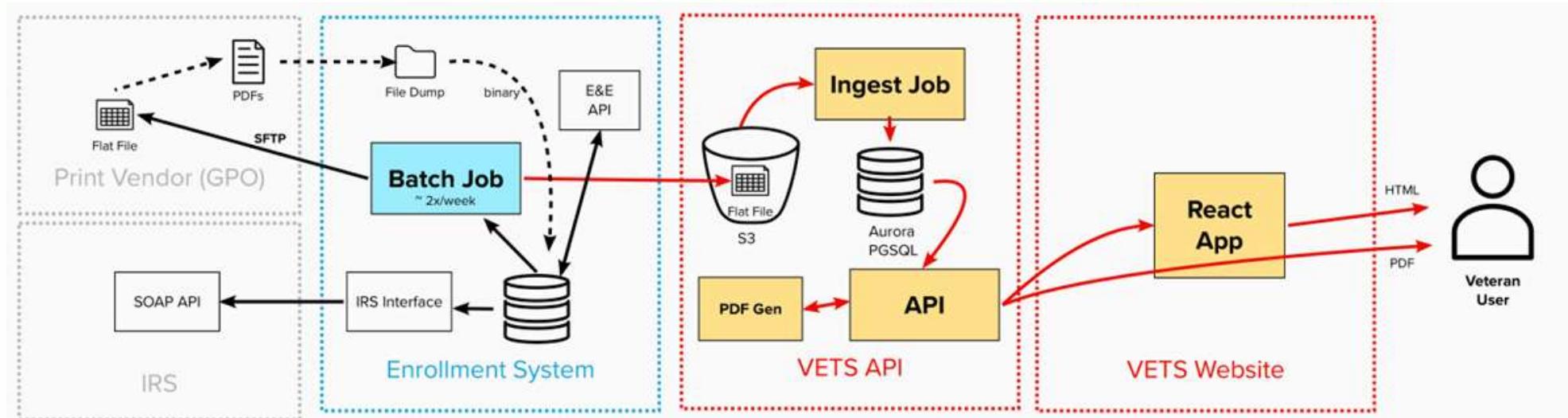
OPTIONS INVESTIGATED	OUTCOME OF DISCOVERY	NEXT STEP
Option 1: Live API		While there is a live API that would fetch data from the Enrollment System, we need the data from a specific point in time (when it is sent to the print vendor) and if we were to use the live API there would be a discrepancy between the paper form and the digital form.  N/A – Not a viable option
Option 2A: Batch Data Export to DB		A <a href="#">batch job</a> runs within the Enrollment System to put the needed enrollment data into a flat file (text delimited) in <a href="#">AWS S3</a> , then a script inserts that data into a database table ( <i>i.e.</i> <a href="#">AWS Aurora PGSQL</a> ). The VETS-API controller required can be built on a standard ' <a href="#">CRUD</a> ' model/controller in <a href="#">Rails</a> .  Figure out how to set up S3 bucket and Aurora database, begin working on PDF generation
Option 2B: Batch Data Export to Flat File		We know that every time a Veteran calls to update their information, a new flat file would be sent via the batch script. As a result, we would have to merge the new flat file with the existing flat file, which creates enough added complexity that Option 2B becomes inferior to Option 2A.  N/A – Not a viable option
Option 3: Manual Export to S3		Since there are already batch scripts to export to S3, manual export doesn't make sense. Additionally, we would not have a VA resource/individual to do the manual export.  N/A – Not a viable option
Option 4: Take PDFs directly from enrollment system		PDFs come back from the print vendor, making this a potentially viable path. However, the storage of so many PDFs would be too high. This could be a backup option. Delay of 10 days would be a potential issue, as data is less fresh.  If there is a serious roadblock with Option 2A we will revisit this option

- Systems outside of the VA
- Existing enrollment system process
- New components to be created by 1095-B team under existing systems

To help understand how our recommended option would work, we mapped out the data flow

User Story: Map out how the data flows through the systems in current state and how we would pull it in future state

### Option 2A: Batch Data Export to DB



Batch job pulling data from enrollment system runs twice a week (from tech discovery with Josh)

# Sprint 1 Deliverables

EPIC	STORY	ESTIMATE	ASSIGNED TO	OUTPUT	REVIEWED WITH VA-PO	SPRINT TEAM GOAL COMPLETED?
Product	<a href="#">#35968 Conduct product discovery through stakeholder interviews to pull insights</a>	5	Carl	<ul style="list-style-type: none"> <li>▪ <a href="#">Stakeholder Interview Notes</a></li> </ul>	N/A*	<input checked="" type="checkbox"/>
Product	<a href="#">#35970 Draft product outline</a>	3	Jordan	<ul style="list-style-type: none"> <li>▪ <a href="#">Product Outline</a></li> </ul>	1/27/2022	<input checked="" type="checkbox"/>
Product	<a href="#">#35971 Draft prioritized backlog for MVP and post-MVP enhancements</a>	8	Ashley	<ul style="list-style-type: none"> <li>▪ <a href="#">Zenhub Backlog</a></li> <li>▪ <a href="#">Story map</a></li> </ul>	2/3/2022	<input checked="" type="checkbox"/>
Design	<a href="#">#36039 Draft the user flow and decision paths of how a Veteran would access the form</a>	5	Grace	<ul style="list-style-type: none"> <li>▪ <a href="#">User flow (Health Care Path)</a></li> <li>▪ <a href="#">User Flow (Records Path)</a></li> <li>▪ <a href="#">User Flow Initial Draft &amp; Comparative Research (Design Review deck)</a></li> <li>▪ <a href="#">Updated User Flows &amp; Paths (Design Review deck)</a></li> </ul>	2/1/2022, 2/4/2022	<input checked="" type="checkbox"/>
Design	<a href="#">#35969 Illustrate key moments in the Veteran happy path for future state</a>	8	Jesse, Kit	<ul style="list-style-type: none"> <li>▪ <a href="#">Wireframes</a></li> <li>▪ <a href="#">Concept Sketches (Design Review deck)</a></li> <li>▪ <a href="#">Medium Fidelity Wires (Design Review deck)</a></li> </ul>	2/1/2022, 2/4/2022	<input checked="" type="checkbox"/>
Design	<a href="#">#36164 Write content for 1095-B pages</a>	8	Carl	<ul style="list-style-type: none"> <li>▪ <a href="#">Content Needs document</a></li> <li>▪ <a href="#">Content in wireframes</a></li> <li>▪ Note: Added on 2/1; pulled up from Sprint 2 given additional design team capacity</li> </ul>	2/4/2022	<input checked="" type="checkbox"/>
Design	<a href="#">#35967 Prepare for user research by creating the documentation needed to conduct research</a>	13	James	<ul style="list-style-type: none"> <li>▪ <a href="#">Research plan</a></li> <li>▪ <a href="#">Conversation guide</a></li> </ul>	2/1/2022	<input checked="" type="checkbox"/>
Tech	<a href="#">#35965 Conduct data discovery to understand where the data sits and what systems house the data we need</a>	8	Nadya	<ul style="list-style-type: none"> <li>▪ <a href="#">Enrollment System Integration Options</a></li> <li>▪ <a href="#">10-10EZ Research</a></li> <li>▪ <a href="#">VA PDF Fill Research</a></li> </ul>	1/31/2022	<input checked="" type="checkbox"/>
Tech	<a href="#">#35966 Map out how the data flows through the systems in current state and how we would pull it in future state</a>	8	Jared, Nadya	<ul style="list-style-type: none"> <li>▪ <a href="#">Architecture Plan Document</a></li> <li>▪ <a href="#">Architecture Diagram Mural</a></li> </ul>	2/7/2022	<input checked="" type="checkbox"/>

SPRINT 1 DEMO

# Preview of Sprint 2

# Sprint 2 will run February 9th to the 23rd

◆ Owned by design team

◆ Owned by product/engineering team

◆ Release

	Sprint 0	Sprint 1		Sprint 2		Sprint 3		Sprint 4		Sprint 5
	Week 1: 01/20 – 01/26	Week 2: 01/26– 02/02	Week 3: 02/02 – 02/09	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
<b>Product &amp; Delivery</b> 	Build backlog			Create Change Management or Communications Plan			Handover plan implementation; prepare for launch			
	PIV Onboarding		Prioritized backlog							Product Launch Collaboration Cycle (as needed)
<b>User Experience &amp; Design</b> 	Immersion & onboarding	Testing prep		Voice of Veteran	Testing prep & recruiting	Voice of Veteran	Design iterations	Design QA		Create post-MVP design refinements
	PIV Onboarding	Wireframes & Design		Design iterations		Design iterations		Design QA		
<b>Engineering &amp; Development</b> 	Create tech discovery plan	Data discovery		POC for data flow						Test & Refine
	Immersion & onboarding	Define data flows - Systems mapping		Build solution (form UI, data connections, storage, etc.)		UAT				
<b>Collaboration Cycle</b> 		Kickoff ◆ Research Plan Review	Analytics Review ◆ Design Intent	◆ Research Plan Review #2 (wireframes)	◆ Midpoint Review	◆ Contact Center Review	◆ Privacy & Security review	◆ Staging Review		◆ MVP Launch

# Sprint 2 will focus on user testing and kicking off the build phase of our product\*

## User Story

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### 1 PRODUCT

- A. Create sprint by sprint product roadmap for 1095-B
  - B. Identify rollout plan needs
  - C. Document proposed process for how opt-in would work
- 

### 2 DESIGN

- A. Conduct UX testing and synthesize
  - B. Update designs to high-fidelity
  - C. Iterate designs based on Collaboration Cycle feedback
  - D. Iterate designs based on VA-PO feedback
  - E. Update research plan for second round of usability testing
  - F. Update conversation guide for second round of usability testing
- 

### 3 TECH

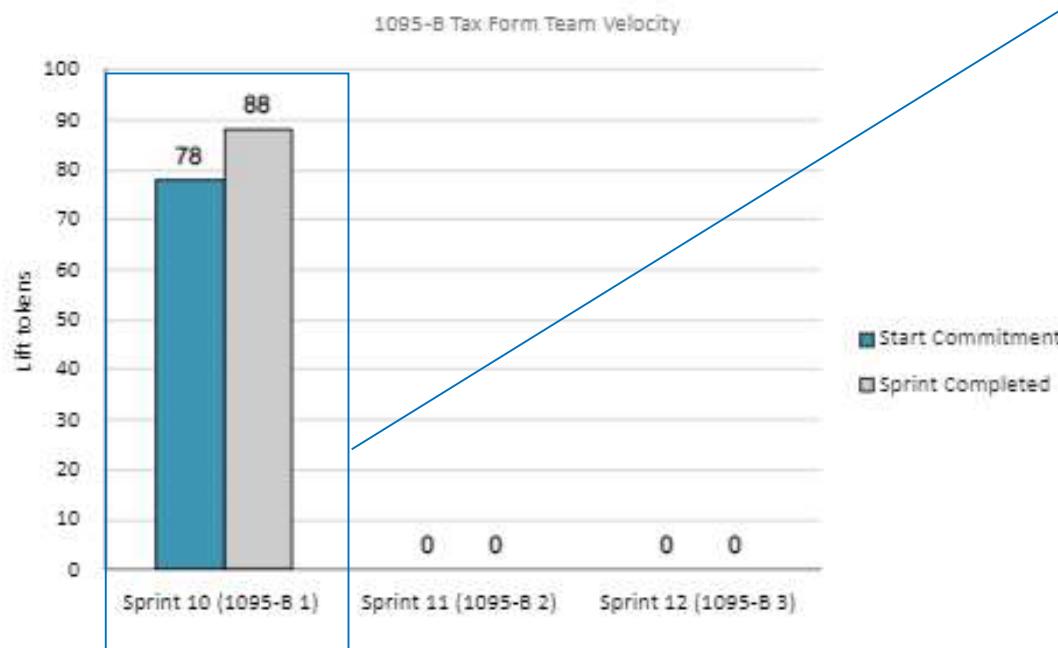
- A. Understand how to provision S3 bucket and database
- B. Align with Technical POCs on approach and handoffs
- C. Start POC (Proof of Concept) of generating a PDF using sample data

Next Sprint Demo: Tuesday, February 22nd

SPRINT 1 DEMO

# Appendix

# 1095-B Sprint Team Velocity

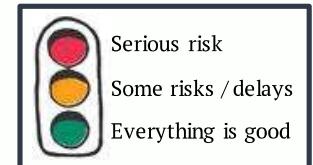


## Velocity Details

- Velocity estimated in story points, using Fibonacci
- All 78 story points committed at beginning of the sprint completed and team exceeded commitment in this sprint
- Total completed for the sprint: 88 story points
  - Sprint 1 deliverables accounted for 66 points
  - 20 points were for platform orientation for new team members
  - 2 points were for offboarding members who left the team in this sprint
- Added 10 points after sprint start as:
  - 8 points were for a story pulled up from Sprint 2 since team had capacity to take on more work
  - 2 new points were for additional new work that came up to offboard team members leaving the team this sprint
- Velocity in Sprint 1 accounted for 10 team members

# Project Risks and Mitigation Strategies

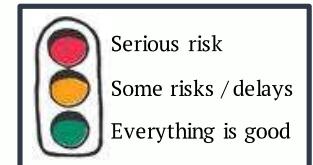
Submitted as part of the Monthly Report on February 7th



Risk and Impact	Mitigation Strategy	Date		Status	Notes
		Entered	Closed		
Identify clear PIV process owner from VA Team. Dedicated Security Officer (Kemi) support ended mid Sept; dedicated Security Officer assistance not available to date. PIV forms loaded to VA Secure SharePoint site on 10/25. Four (4) people pending e-QIP initiation. Gap in process likely delay contract compliance and access to systems.	11/1 MO Studio built an end-to-end PIV checklist based on other VA project work. Will request ad hoc support from Kemi to validate steps. Identify clear PIV process owner from VA Team. Dedicated Security Officer (Kemi) support ended mid Sept; dedicated Security Officer assistance not available to date.	11/1/21	2/4/22		1/20/22 PIV responsibility turned over to MOVE team member with PIV access. 1/28/22 Training part I provided on VA security clearance and adjudication 2/4/22 Training part II for VA security and adjudication process
Recruiting, hiring, and onboarding candidates impacted not only by the tight labor market (i.e., "Great Resignation") but also the lack of clarity on Product Strategy and needed capabilities/skill sets on the team to deliver on expansive scope. Delivery teams pick up the workload as time to fill roles is extended.	Brought in external partner / Chief People Officer (Jen Tress) to redesign, deploy, and optimize recruiting, hiring and onboarding at MO. Piloting process in Lead Product Manager and optimizing with Design Lead, Tech Lead, Research Lead, etc. Creating cohorts of candidates and working them through a refreshed process through Feb and Mar 2022 to ideally hire and onboard in advance of Apr 1st.	11/2/21	Open		5 individuals have been onboarded to the team as of 12/1.

# Project Risks and Mitigation Strategies

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Risk and Impact	Mitigation Strategy	Date		Status	Notes
		Entered	Closed		
Operating in an environment with multiple stakeholders and multiple layers of influence and integration can lead to misaligned goals and competing priorities.	Develop a deliberate and persistent omnichannel approach to stakeholder engagement. Improved understanding with stakeholder sessions with VA-PO.	1/20/22			Ongoing
There are a lot of unknowns around the technical aspect of product. Technical roadblocks could cause delays later in production.	Prioritized technical discovery and regular stakeholder engagement early in process to identify the technical dependencies and highlight gaps that need to be addressed. Proactively working with current CEDAR IDIQ / MOVE partners and exploring alternative paths to address any emerging capability gaps in expeditious manner.	1/20/22			
Potential for government shutdown. Loss of access to VA team could lead to uncertainty on priorities; limited ability to remove blockers, and other delays.	Plan for work that could be done independently to keep production moving forward.	1/20/22			
IRS stakeholder is outside of VA ecosystem. Building without guidance or legal review regarding compliance with IRS regulation could result in sanctions or damage to reputation.	Conduct research on available information surrounding current IRS 1095-B tax form regulations. Seek legal review through VA resources.	1/20/22			