# Ask VA Integration

* Initiative label: Ask AVA Integration with VA.gov
* Slack Channel: askva\_integration\_team, askva-watercooler
* Github: [department-of-veterans-affairs](https://github.com/department-of-veterans-affairs)
* Team(s):
  + VAPO(s): Chante Lantos-Svetts, Andrea Schneider
  + VA Notify: Melanie Jones, Kyle MacMillan, Jacob Cheriathundam
  + myVA
  + VA.gov platform team
  + VA chatbot
  + Microsoft Dynamics 365 team
  + Drupal (VA.gov CMS)
  + OCTO groups (MHV on VA.gov, Authenticated Experience, etc)
  + Mobile App Team
  + Dynamics Messaging Team
  + Accessibility: Brian DeConick

## Executive Summary

AVA is an online portal that allows Veterans, caregivers, and supporting personnel in education, debt, loans, etc. to submit questions to VA and receive a secure message response.

Currently, Ask VA (AVA) resides within a stand-alone Microsoft portal that is inconsistent with the VA design standards, is not mobile-friendly, and has accessibility issues.

AVA on the modernized VA.gov platform will be a digital support channel that works with other tools and features on VA.gov and VA ecosystem to quickly and accurately answer users' questions. Users should feel it is easy and intuitive to submit their issues and receive adequate updates and information that results in a final resolution. Ultimately, we want AVA to feel part of a cohesive and user-centered approach to support.

## Problem Statement(s)

**Form Design, and Content, Mobile-Friendly Experience, 508 Compliance**

As a Veteran:

* It takes me too long to submit my question because of the many questions.
* It’s challenging to find AskVA.
* The form layout is not mobile-friendly - it doesn’t fit on the screen, and there are too many questions on the same page.
* The form is not accessible to all Veterans.
* The user experience of submitting an inquiry is not easy and not intuitive.

As VA agent:

* I am concerned that the form is not 508 compliant.

**Surface FAQs and Solutions**

As a veteran:

* I am not surfaced with relevant FAQs that answer my question without submitting an inquiry.
* I am not surfaced with relevant forms and solutions that answer my question without submitting an inquiry.
* The design of the relevant FAQs and solutions and forms surfaced need to be mobile-friendly.
* The design of the relevant FAQs and solutions and forms surfaced need to be 508 compliant.
* AskVA is not integrated with any existing knowledge base.

As an agent:

* I have to manually look up relevant information to answer a Veteran’s questions.
* I have to manually search for similar inquiries to answer a current inquiry.

**“Smart” inquiry routing based on topic selection and free-text query**

As a Veteran

* The system needs to ask me many questions to understand where to route the request.
* My queries are often routed incorrectly.
* Given a free text query I have entered, the system cannot understand it fully to route the request.
* It takes on avg. 5 days to receive a solution to my inquiry which is too long.

**As an agent:**

* **I have to manage mis-routed inquiries.**

**Integrate with VANotify and myVA**

As a Veteran

* There isn’t an easy way to see all of my notifications of my inquiries in one place.
* I am not able to set preferences on the notifications I can receive on my inquiries.
* I want to be able to set preferences on the channels of communication.
* If authenticated, I want to be able to see my notifications in myVA.

**Secure Messaging (SM) on VA.gov**

As a Veteran

* I want to see all of the communication from my inquiries in one place in myVA.
* I want to be able to manage my inquiries and responses in one place in myVA.

## Desired Outcomes

**Form Design, and Content, Mobile-Friendly Experience, 508 Compliance**

As a veteran:

* I can submit my questions quickly.
* It’s easy for me to find AskVA.
* It’s easy to quickly ask a question from my phone.
* The new form is accessible to me.

**Surface FAQs and Solutions**

As a veteran:

* I am shown relevant FAQs that answer my question without having to submit an inquiry.
* I am shown relevant forms and solutions that answer my question without submitting an inquir.
* The relevant FAQs and solutions and forms surfaced are mobile-friendly.
* The relevant FAQs and solutions and forms surfaced are accessible to me.
* AskVA is integrated with all existing VA knowledge bases.

As an agent:

* I am shown relevant FAQs, forms, and solutions so that I can quickly answer the inquiry raised to me.
* I am shown inquiries similar to the one I am looking at so that I can reference them to answer an open inquiry.
* Automatic answers and I can verify if it’s right?

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## Audiences Served

Veterans or Users

VA Agents

VA Managers

## Core Bet(s) (Exploration Points)

*[Chunks of work we will do to learn more / move forward. (So a bet that doing [this work] will produce [this outcome] that we can track with [this Key Result or KPI]. The Bets will often relate to the Epics we create under this Initiative.]*

**Form Design, and Content, Mobile-Friendly Experience, 508 Compliance**

1. Explore the location of where Ask VA will live so that it can be easily located by our users.
   1. Outcome:
2. Explore the design of the form and what the user journey will look like. (wizard or topic + free text).
   1. Outcome:

**Surface FAQs and Solutions**

1. Identify all the content sources (VA knowledge bases) and how they can be integrated.
   1. Forms
   2. FAQs
   3. Solutions
   4. Scripts/User Guides:
   5. Outcome:
2. Learn how we can integrate with Drupal (VA.gov CMS) for content tagging
3. Explore use of Microsoft Cognitive Search APIs
4. Explore use of LLM like GPT
5. Explore building a model on AskVA Inquiry Database for solution paths
6. Explore use of NLPs

**“Smart” inquiry routing based on topic selection and free-text query**

1. Explore building a model on AskVA Inquiry Database for routing
2. Explore use of NLP for routing
3. Explore use of Microsoft Cognitive Search APIs or an LLM like GPT for routing
4. Explore Microsoft Dynamics 365 agent-facing modules.

**Integrate with VANotify and myVA**

1. Explore VA Notify capabilities and the integration process.

**Secure Messaging (SM) on VA.gov**

1. Explore myVA secure messaging management capabilities and integration process.

## How we will know if we are right (KPIs or OKRs)

Objectives:

* Streamline the process for users to receive answers to their questions
* Create a modernized mobile friendly, accessible online support experience aligned with VA Design standards
* Decrease the time it takes for cases to be resolved
* Increase User Satisfaction

Key Results:

* 20% of users are able to get answers to their questions without submitting an issue
* 70% of users are satisfied with their experience
* Case resolution time is decreased by 25%
* Rerouted cases are reduced by 50%
* Accessibility issues are eliminated

## Team Questions

## Assumptions

## Preliminary Research Plan

### Research goals [DRAFT]

* Understand how users expect to start an inquiry
* Understand how users categorize topics and subtopics
* Understand which outcome(s) a user expects to get out of Ask VA
* Review where Ask VA should live and be linked to from

### Research questions [DRAFT]

* Understand how users expect to start an inquiry
  + Do they expect to start by entering free text?
  + Do they expect to start by selecting a topic or subtopic?
  + Are there alternative ways that users expect to start their inquiry?
* Understand how users categorize topics and subtopics
  + Which topics do users contact us about (in their own words)?
  + How do they break topics into subtopics (in their own words)?
* Understand which outcome(s) a user expects from Ask VA
  + What does a user expect to receive (FAQs, a link to a page on VA.gov, specific information related to their query, help from a real person) from Ask VA?
  + Why are they using Ask VA for their inquiry instead of another method?
  + Do they expect to talk to someone as an outcome? How soon? Or is this just if all else fails?
* Review where Ask VA should live and be linked to from
  + Where do Veterans expect to go to find Ask VA?
  + Where are Veterans when they realize they might need to ask a question?

## Solution Approach/Hypotheses

## Phase 1 MVP:

1. Stand up a page on VA.gov
   1. Create a SPIKE to validate the instructions from the VA’s developer docs for [adding a new application to the va.gov site](https://depo-platform-documentation.scrollhelp.site/developer-docs/creating-a-new-application).
2. Bring Ask VA up to VA.gov design standards
   1. Narrow down scope of use cases; including authenticated vs. unauthenticated.
      1. We need to see if the full scope can be implemented in the MVP after understanding use cases, taxonomy and routing rules.
   2. Write topics and categories based on content style guide (without changing form functionality and output).
   3. Write form questions based on content style guide (without changing form functionality and output).
   4. Update UI to reflect the VA Design System.
   5. Make it mobile friendly.
   6. Do iterative user research to test usability of new form design and content updates.
   7. Make it 508 Compliant.
   8. Complete necessary PRA updates.
3. Implement form on VA.gov
   1. Understand current routing rules
   2. Review existing Ask VA front-end and back-end code to see how it works
   3. When Inquiry data is collected on VA.gov, it is sent to the Dynamics CRM for the agents to work through
   4. Releasing this new form to a page on VA.gov
   5. Build GitHub Actions workflows for deploying to DEV/STAGiNG/PROD, with automated tests and linting as the gatekeepers to those environments.
   6. Understand how Dataverse and CxDW(?) play into this process.
   7. Ensure devs have proper tools and permissions to build the legacy app, and work on the prototype code.
   8. Ensure devs have proper access to resources in all environments.
   9. Ensure devs/qa/pm have access to error logs.
   10. Ensure devs/qa/pm/ux have access to analytics and reporting.
   11. Add tools to build pipeline to run static analysis for 508 and mobile-friendly issues.
   12. Understand auth and unauth access patterns. Be ready for oauth changes in the coming months from platform/identity team.
4. Integrate with My AVA Dashboard for
   1. Status on inquiries
   2. Need more information/research with Ask AVA CRM team
5. VA Notify integration

* MyVA is creating a notification center, strategically want to integrate there for authenticated users.
* Spike on notifications on where it stands and how we would move it to VA gov, and how VA.gov will trigger the notifications.

Stretch Items

* Surface resources using existing knowledge base
  + Leverage existing CQA (Custom Question/Answering) endpoints to retrieve resources related to query
  + Do iterative user research to test how resources are surfaced to a user.
* Inbox/secure messaging
* Ask MHV to understand where they stand on this, and what is the strategic goal.
* Understand Education Use Case
* Explore use of NLU/free text
* AVA placement/integrations
* Chatbot
* Resources and support
* Success Metrics
  + Customer satisfaction
    - Implement customer satisfaction on AVA
      * Follow up with Ask Ava to measure current satisfaction
    - % of tickets rerouted
    - Time to resolution

## Timeline

## Unanswered Questions

* How does this affect things if we can’t handle Secure Messaging out-of-the gate? Need a reminder about how Secure Messaging currently works (do they need to go to MHV to see messages answered by Contact Center agents from AVA?).

## Important Context and Decisions

## [The information that someone would need if they came onto the team and needed to understand how we got where we are now. ]