#### **Overview**

*There is roughly a 1:many relationship between products and initiatives, or our attempts to improve a product/achieve Veteran outcomes. The same goes for product outlines and initiative briefs. This template can be used as product documentation for the Collaboration Cycle, especially when iterating an existing product. In addition, the Brief is an important communication tool within a team and between the team and Crew Chief/PO/other teams.*

Examples:

* *Product: On-site Search*
  + *Initiatives: Type-ahead,* [*Search Landing Page*](https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/products/on-site-search/search-landing/initiative-brief.md)*,* [*Surfacing Other Search Tools*](https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/products/on-site-search/surfacing%20other%20search%20tools/initiative-%20brief.md)
* *Product: VA.gov Profile*
  + *Initiatives: Combine Account & Profile, Direct Deposit for Disability, Candidate Address Validation, Direct Deposit for Education, Notification Preferences*
* *Product: Disability Claims*
  + *Initiatives: Original Claims, Benefits Delivery at Discharge (BDD)*

💡 Helpful guidance/tips

## **Outcome Summary**

*Brief statement describing opportunity you're pursuing e.g. "Increase Use of Search Tools on VA.gov." Include a measurable outcome (i.e. metric) you're trying to affect.*

* Ability for a Veteran to update some of their information online–namely contact, demographic, financial, dependent, and health insurance.

Related/Associated product(s)

* 10-10EZR PDF
* VA.Gov Profile
* Product | Link to product outline

## **Problem**

*Describe the challenge / pain point you seek to address.:*

* Veterans need to update their information and currently can only do it via phone, at a facility, or by printing and mailing 10-10EZR form (a couple of exceptions are on VA.Gov Profile)
* We believe this impacts at least hundreds of thousands of Veterans per year based on the number of paper 10-10EZRs processed
* Veterans affected are trying to change their contact information–how VA gets in touch with them; and/or insurance, dependent, or financial information which impacts how much they have to pay for their VA healthcare
* This furthers OCTO-CIO’s mission of trying to bring more common “paper” functionality online, allowing Veterans to do more things online
* This initiative has the bonus effect of helping reduce workload frontline staff and HEC who currently have to update this information prior to an appointment, or process these paper forms. The ability for Veterans online should reduce pre check-in changes and paper EZR forms.

Template:

* What is the problem and who is affected? And, what evidence do we have of the problem?
* Why do you think the problem is occurring? Other reasons why this might be occurring?
* How does this initiative help further OCTO-DE's mission and goals?

## **Measuring Success**

### **Key Performance Indicators (KPIs)**

* Veterans update their information online (e.g. Financial Disclosure)
* There is a reduction in the number of paper EZR forms processed and calls to update information
* Ensure that Veterans who want to update their information via phone or paper still can

*VA.gov products measure success against Ease of use, Service Completion, Trust/Satisfaction, Health.*1  
💡 *Identify balancing metrics to ensure you're not bringing about undesired outcomes.*

* Product KPI | Baseline | Target | Link to data source (e.g. GA, Domo)

## **Discovery**

### **Assumptions/Risks**

*Identify risks related to usability, value to users, feasibility/implementation, and viability given organizational constraints2. Indicate how you'll validate/test against these risks. Inspired by* [*SVPG's Four Big Risks*](https://www.svpg.com/four-big-risks/)*.*

* **Value Risks (will people use it):**
  + Will Veterans use this? Will Veterans who need to update their information want to do so online, or will they only want to do so via phone, mail, and in person?
  + Will enough Veterans use this to justify the expenditure?
* **Usability Risks (can people figure out how to use it):**
  + Will Veterans know that they can now update their information online?
  + Knowing they can update their information online, will Veterans choose to do this, or will they continue paper/phone/in person?
  + *Note: We believe this to be the largest risk for this initiative. We will work with both the groups who currently work to update this information, as well as other projects who have brought paper functionality online to do our best to notify Veterans that they can now update their information online. We believe that if this initiative is not successful it will be due in large part to our inability to reach Veterans who would want to update this information online.*
* **[Technical] Feasibility Risks (can we build it with available tech/data):**
  + Can we set up an API with VES to send and receive EZR information?
  + What required fields will be needed by VES to update a Veteran’s information akin to a paper EZR?
  + Will online information changes behave the same as a paper EZR change?
  + What are the downstream effects of changing this information? How is this information used to process a Veteran into a Priority Group? Is there anything we need to do to ensure this process works?
  + What external systems (e.g. IRS, SSA) does VES interface with to make determinations of a Veteran’s information? Do we need to do anything with these third-party applications?
  + Examples:
    - Upstream/Downstream API/Data availability and reliability
    - Site performance impacts (see [Google Lighthouse](https://developers.google.com/web/tools/lighthouse), [WebPageTest](https://www.webpagetest.org/), #-daily-lighthouse-scan)
* **Organizational Viability Risks/Constraints (will there be a positive organizational impact):**
  + This should help OCTO-CIO by providing another thing for Veterans to do online
  + This should help stakeholder relationships as it should reduce the number of paper EZRs processed, the number of phone calls to update information, and the number of Veterans who need to update their information during pre check in.
  + Examples:
    - VA stakeholder testing, marketing, compliance requirements

### **What're you building**

\*What's in scope for you to build with this initiative? Describe key features/flows. *What have you explicitly decided to not include and why?* \*How does this solution address your Assumptions & Risks?

We’re building the ability for Veterans to update information currently contained in the 10-10EZR online. This includes EC/NoK (being worked on by another team), dependent information, Financial information, expenditures, and health insurance. This will expand on the editable contact information which currently lives on VA.Gov. At this time, no non-EZR information will be added online.

MVP for this will start with allowing the Veteran to view and update their financial information online. Future iterations could include Emergency Contact and Next of Kin (currently being worked on by a different team), health insurance information, and dependent information. Out of scope for this effort is recreating the paper 10-10EZR one-for-one in an online format. This initiative is aimed at allowing Veterans to update their information in the ways and places they desire to do so, and not the ways in which VA paper forms are laid out.

#### **Go-to-market**

* Include notifications that Veterans can do this online in:
  + Letters to Veterans
  + Announcement on VA.gov?
  + Field guide (for frontline staff, particularly pre check-in)
  + Help desk manual
  + Other TBD
* This will require collaboration with:
  + VA.gov Authenticated Experience team
  + HEC
  + Frontline staff/their leadership
  + Help desk/their leadership
  + Enrollment System team members

*What marketing, outreach, or communications are necessary for this product to be successful? Which groups/orgs are necessary to make this happen?*

We will work with stakeholders on a marketing plan directed at Veterans and frontline staff to let them know that Veteran information can now be updated online. We will use other teams who have brought new functionality online as models for our marketing. We will also provide a field guide for help desk to ensure that they know a Veteran can now do this online.

## **Launch Planning**

### **Collaboration Cycle**

💡 *Use for any Collab Cycle tracking, questions.*

* Kickoff ticket

Here is an example from the Household brief for this section. You must include the Incident Response section to pass the Privacy, Security & Infra review (part of Collab Cycle)

### **Collaboration Cycle**

* Collab Cycle ticket (in progress of being created) #[62926](https://app.zenhub.com/workspaces/10-10-health-apps-5fff0cfd1462b6000e320fc7/issues/gh/department-of-veterans-affairs/va.gov-team/62926)
  + - [ ] Design Intent
  + - [ ] Content and IA
  + - [ ] Research
  + - [ ] Midpoint
  + - [ ] Contact Center guide
  + - [ ] Analytics
  + - [ ] Staging
  + - [ ] Privacy & Security

### **Incident Response info**

* The VA.Gov profile is online and in production. This change will only add a new field, and potentially new menu option to the profile.
* New information will be sent to the Enrollment System (ES), but it will be information that is already processes via the paper 10-10EZR form, or changes made by staff via phone or in a facility.
* This is also information that can be entered in the 10-10EZ form when Veterans are signing up for care.
* The new fields will be viewable to all Veterans with a VA.Gov profile (note: this is the plan currently for implementation, this may change)
* We will use the following VA.Gov Profile applications for any latency or errors being logged
  + TBD (will get this from profile team)
* If there are any errors or issues found as a result of this change, we will disable the code by switching off the feature toggle which will result in the change being reverted to its previous state prior to release. We will then begin triaging the root cause and determining a solution.
  + Timeline for triage and solution im
* Main POCs:
  + Alex Seelig ([alex.seelig@agile6.com](mailto:alex.seelig@agile6.com)) - Product Manager
  + Heather Justice (heather.justice@adhocteam.us) - Product Manager
  + Engineering lead TBD
  + Patrick Bateman (patrick.bateman@va.gov) - Product Owner

Household Enhancement Examples

* The 1010EZ form is currently in production; we are only changing the content and flow of the application's questions. The information being sent after submission to the Enrollment System remains unchanged.
* There are no new endpoints implemented with this change
* This change applies to the full application flow, as well as the Short Form flow (less than 50% disability rating) ([chart](https://www.sketch.com/s/da85cf44-4503-4e98-834e-ff068b242ef6/a/zxZzO2l))
* We will use the following 1010EZ applications for any latency or errors being logged
  + [Datadog monitoring dashboard](https://app.datadoghq.com/dashboard/8it-wik-f5q/vsa-1010-team)
  + [Datadog Real User Monitoring dashboard](https://vagov.ddog-gov.com/rum/performance-monitoring?query=%40application.id%3A9d5155fd-8623-4bc9-8580-ad8ec2cdd7fa&from_ts=1687971959215&to_ts=1688058359215&live=true)
  + [Sentry](http://sentry.vfs.va.gov/organizations/vsp/issues/)
* If there are any errors or issues found as a result of this change, we will disable the code by switching off the feature toggle which will result in the change being reverted to its previous state prior to release. We will then begin triaging the root cause and determining a solution.
  + Timeline for triage and solution implementation will be fast-tracked to complete within 1-3 days.
* Main POCs:
  + Alex Seelig ([alex.seelig@agile6.com](mailto:alex.seelig@agile6.com)) - Product Manager
  + Heather Justice (heather.justice@adhocteam.us) - Product Manager
  + Engineering lead TBD
  + Patrick Bateman (patrick.bateman@adhocteam.us) - Product Owner

### **Timeline**

*Describe any major milestones for this initiative including organizational, legislative, etc. constraints.*

1. The only current major milestone is to release 11/10/23

* [Link to Release Plan for this Initiative](https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/platform/product-management/release-plan-template.md)

#### **Initiative Launch Dates**

* *Target Launch Date*
  + 11/11/2023
* *Actual Launch Date*
  + tbd

## **Screenshots**

### **Before**

### **After**

#### **Communications**

*Where will you discuss this initiative?*

* Slack Channel: #1010-health-apps, #accountexp-authexp
* GitHub feature label: 1010-ezr
* Team Name: 10-10 Health Apps team
* Product POCs: Alex Seelig
* Veteran letters requesting information update
* With folks who deal with the paper 10-10EZR
* Folks who do check in and pre check in
* Social media
* VA.Gov Notifications?
* MHV?

#### **Stakeholders**

* HEC
* OCTO leadership
* AE team
* MHV team (potentially)
* VES Team
* Help desk
* Frontline staff

*What offices/departments are critical to make this initiative successful?*

1 [VA.gov Analytics - KPI Framework](https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/platform/analytics/Analytics%20Playbook/va-gov-platform-analytics-kpi-framework.pdf)2 [SVPG: The Four Big Risks](https://svpg.com/four-big-risks/)

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