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Omnichannel PE Offsite, June 2022

Intended outcomes of the offsite

1. Collaborate and build relationships with your coworkers across the Veteran Experience Services product line.
2. Identify 3 Veteran experiences we hope to create or improve in FY 23.
3. Draft a quarter-by-quarter action plan for each of those problem spaces.

Actual outcomes

1. Collaborate and build relationships with your coworkers across the Veteran Experience Services product line.
2. Articulate an Omnichannel vision statement that can be used to assess potential to improve the Veteran experience in any product line.
3. Identify several priority Veteran Omnichannel experiences we hope to create or improve in FY 23. (listed by priority of those in attendance)
4. Draft a quarter-by-quarter action plan template for priority problem spaces. Provide examples of action plans to assess existing planned work efforts and possible gaps. Examples include possible focuses on Claims status (with appeals) experience, Eligibility and enrollment experience/PACT ACT example, and health care experience with a focus on appointments and prescriptions)

Omnichannel vision

From the perspective of OI&T, the purpose of the Omnichannel effort is to ensure that Veterans (and VA customers) can engage in a continuous conversation with VA in any way that suits their preferences and capabilities.

Veterans (and VA customers) need an on-demand, unified response to any inquiry to contain the right information, guide them to the right action, or connect them with a sufficiently prepared VA person that will help them reach a resolution, so that Veterans (and VA customers) can get VA care, benefits, and services with as little effort on customers' part as possible.

How to use this vision

Veterans and VA customers engage with VA across a variety of technological and non-technological channels, such as web sites, mobile applications, chat/SMS, phone calls, physical letters, and more.

By examining the experience of the customer around any focus area (user story, such as "I'm a Veteran and I would like to know the status of my claim.") with an Omnichannel framing, using the vision above, it will help you assess the following:

- What is the current state of the Veteran/customer experience, by channel?
- Which channel is the best channel to direct Veterans/customers to based on their preferences and capabilities?
- How does a Veteran/customer move from one channel to another?
- How could VA staff responsible for that channel experience make the Veteran experience better?
- How could VA staff responsible for that channel experience have a better experience themselves?
- What is the current state of information/content provided on that channel?
- What information should serve as "source of truth" content across all channels?
- Where are their channels that result in the Veteran/customer not getting a successful resolution?

Offsite prioritized Veteran experience focus areas

This is the result of a problem space exercise and conversation, with representation from VEO, PE, and OCTO. They are placed in priority order for those in attendance, highest priority first. Please note that this may not represent priorities in your team, and it does not constitute a final list of priorities.

1. Claims submission and tracking experience, including status of claim/appeal when appropriate
2. Eligibility and enrollment in benefits
3. Health care experience, particularly around appointments and prescriptions
4. Crisis management (should be integrated into every focus area)
5. Records of previous interactions with VA
6. Debt and personal finance management
7. Education
8. Benefits overview
9. Mission act
10. Medical records

Sample action plan for claims submission and tracking experience

Problem space, general description

I'm a Veteran and I need to submit a disability claim, stay up-to-date on the status of that claim, and if necessary, any appeals processes that arise from that claim.

Problem statement, greater detail

Veterans and VA's customers have a need to **have their expectations met before and throughout the disability claim submissions process, as well as related appeals processes.**

This need will be met when **additional evidence requests decrease, claim processing time decreases, and customer satisfaction with this process increases.**

These needs should be solved by the Veteran/customer using [VA.gov](#), the VA mobile app, the IVR system, VA Notify for notifications, automated and live chat functionality, and appropriate back end systems (EVSS, etc.)

The primary value the customer gets from this experience is, in priority order, **financial support, access to health care, a reduction in stress, and increased trust in the VA as a partner.**

The first customers of this improved process will benefit from **guiding content that is served from a single source of truth, messaging that stays consistent across all channels, the ability to see a data informed "completion score" prior to submission pointing out possible omissions, and the ability to subscribe to updates on the channel of their preference, with all updates, including claim decision, being delivered in that preferred channel.**

Currently, customers get this need met by **filing a claim on [VA.gov](#) or on paper, calling contact centers to check on the status of their claim, and receiving a decision via a physical letter only.**

An Omnichannel solution as described above will be better, because it will **increase the ability for both Veterans and VA to track the status of claims, and it will reduce the volume of calls to VA regarding claim status.**

Quarterly action plan, FY23

Quarter 1 (Oct - Dec 22)

We hope to learn

- what Veteran/customer personas exist in the claim submission and tracking space, specifically preferences around communication channels
- how well Veterans understand current claim status messaging
- what information Veterans would find valuable, but is missing from those status messages

We hope to build/do

- web content assessment of [VA.gov](#), existing notifications, chat bot messaging, letters, call center scripts, and IVR content

- automated push notifications based on [VA.gov](#) profile notification preferences for any claim status changes
- VA signals measurement survey for claims submission and processing

We hope to measure

- baseline satisfaction rate for the [VA.gov](#) submission process
- open rate for notifications
- conversation rate for actionable notifications
- a reduction in duplicative content
- an increase in plain language scores
- baselines for trust, ease, effectiveness and emotion related to claims
- an increase in the ratio of Veterans with a [VA.gov](#) profile to Veterans that have an active claim in process

Quarter 2 (Jan - Mar 23)

We hope to learn

- which customer personas filed/requested status the most often, and how does the experience differ for different customer personas
- how effective the content is regarding "how to apply"
- what are the gaps between the status messages provided and what Veteran's would find useful
- the business logic or formula that would inform a working estimate of how long a claim can take to be resolved

We hope to build

- core architecture and structured content model for a claims content, regardless of channel
- revised status notification content according to previous quarter's research findings
- claim status self-service integrated into IVR system, mobile app, and other channels based on persona preferences

We hope to measure

- [VA.gov](#) site feedback and content utilization; coverage across channels/systems
- VSignals measures increase (trust, ease, effectiveness, and emotion), call volume around claims decrease
- utilization and conversation rate comparisons across channels (are any new channels being used more than others?)

Quarter 3 (Apr - Jun 23)

We hope to learn

- what will it take to prepare call centers for handling live agent/chat around claims
- audit channel experience parity and gaps across customer journey, including appeals
- what are the best kind of actionable feedback to provide to Veterans upon submission to inform a "completion score" MVP

We hope to build

- final claim decision is available via any channel
- all military exposure, previous claims awarded are available in [VA.gov](#) customer profile

We hope to measure

- customer feedback at time of claim decision (via Medallia intercept)
- self service channels usage increase
- [VA.gov](#) customer profile completion rate

Quarter 4 (July - Sept 23)

We hope to learn

- what information is missing from the process that Veterans would like to see
- number of claims submitted using new processes, engagement rates with notifications (open rate, conversion rates)
- how might we reduce manual effort for Veterans
- Veteran satisfaction KPIs for all self service products and touch points in the claims experience

We hope to build

- a mature claim submission completion score tool
- a dashboard of all claims status, gaps for both Veterans and call centers

We hope to measure

- Reduced rejections
- Reduced processing time
- Increased customer satisfaction
- Increased usage of new tools
- Baseline focus group or survey around improved submission experience and status notifications

PACT ACT Working Group

Problem Statement

Veterans and VA customers have a need to determine eligibility for health and benefits from the PACT Act. This need will be met when they are informed and enrolled in benefits available from the PACT Act. The number of enrolled Veteran in VA healthcare benefits and the number of claims approved for conditions covered under PACT Act must increase. These needs will be solved by the Veteran using VA systems including [VA.gov](#), Notifications, and the VA mobile app; with back-end connections to VA Profile and VADIR.

The primary value to Veteran customers is “one-click” enrollment or claim submission. Our first users will be able to login, see pre-filled forms, and submit these as health enrollments or presumptive claims. Veterans and customers will find this by mass marketing, email, text messages, or push

notifications on their accounts. They accomplish this now by searching many varied sources of information, working with VSOs to determine eligibility, and completing lengthy forms. This will be better than that because it reduces the burden on Veterans by doing the heavy lifting (determining eligibility and completing the forms) for them.

Q1

Learn/Research

- Identify VA authoritative sources and impacts to VHAP
- Understand current eligibility workflows and do user research with HEDC and other enrollment admins to understand pain points
- Understand Veteran expectation around PACT Act changes
- Research what MVP features can we build for moving a single claims type to a one click experience
- Work with benefits automation team to understand their roadmap for presumptive claims / automatic contentions

Touchpoints/Products

- I received a push notification in the mobile app
- I receive a mass mailer or see a google ad
- Call center rep was able to enroll me in health and process a PACT claim
- API to complete data set for determining eligibility. VA profile, VADIR, BGS, VBMS
- Notifications on [VA.gov](#) in account
- Logged in user on [VA.gov](#) sees their eligibility for PACT
- Communication strategy for Veteran outreach from generated email
- Experience build out in Spanish and other top languages/ access to interpreter.

Metrics

- Number of referrals to PACT info from email, push, and notifications
- Increase in Veteran awareness of PACT Act
- 80% say yes to “did you find what you were looking for” related to PACT Act
- Increase in number of new [VA.gov](#) accounts
- Percent increase in net new Veteran benefit use

Q2

Learn/Research

- Are we reaching our intended audiences? If not, might we improve reach?
- What info/fields need to be in a content management system?
- Research A/B testing or percent Veteran rollout of MVP results (inform tool).
- What issues area VA enrollment staff experiencing and how might we iterate an MVP to address?
- MVP results including number of Veterans in the system, Veteran not in the system

Touchpoints/Products

- I see a pre-qualified benefit on my [va.gov](#) account and am asked if I would like to submit
- MVP system the at provides an automated look at prequalification for Veteran

- Automated pre-qualification decision available in the mobile app
- [VA.gov](#) CMS is set up as a single source of truth and shared knowledge base for omnichannel

Metrics

- CSAT around PACT Act lifecycle and [VA.gov](#) feedback scores related to PACT user flows
- Did Veteran disability percent increase?
- Number of presumptive claims submitted

Q3

Learn/Research

- What other benefits do Veterans want for pre-qualification
- Are we able to automate PACT Act claims at scale?
- How engaged are VSO/Attorneys?

Touchpoints/Products

- I can one click into getting VSO support for PACT
- I ask the Chatbot about PACT

Metrics

- Increase health care enrollment and successful disability compensation claims
- No PACT Act claims in the VBA backlog
- Increase non-PACT users by 10%

Q4: or where we want to be after a year

Learn/Research

- How much of a health/benefit claim can we automate?
- We have a clear understanding of who we're serving well and who we are missing – and a plan to better serve them
- Do Veterans find the one-click features useful?
- Do we need to expand outreach to provide additional services to Veterans?
- What is the #1 thing we can do that will improve lives with the PACT Act
- Mechanisms that strengthen Veteran's trust in VA

Touchpoints/Products

- A seamless, simple, consistent experience from notification through awareness and successful claim decisions/enrollment
- Knowledge base with plain language guidance federated to every channel (VSO, [VA.gov](#), mobile, notification)
- An application that is efficient and easy to use for Veterans to adjust their benefits with one-click
- Health and Benefits enrollment APIs

Metrics

- Average time to CEST / award PACT Claims
- % Of eligible Veterans who have successfully enrolled and received claims decisions

- Number of new Veterans getting health care with PACT
- Veteran Trust is increased
- Number of disability compensation claims approved for PACT

Healthcare experience, specific focus on Pharmacy

Problem Statement

Veterans and VA's customers have a need to accomplish key healthcare tasks such as managing their prescriptions. This need will be met when Veterans can accomplish these tasks quickly and with little effort. These needs will be solved by harmonizing existing digital experiences on [VA.gov](https://www.va.gov), MHV and the VA Mobile App as well as in-person and voice channels so that it doesn't matter how a Veteran contacts VA because all channels can resolve their need.

[Note: To build the experience that Veterans want, it will be critical to engage stakeholders across the healthcare landscape so that there is clarity about when to use specific technology stacks and products to enable specific experiences, e.g., which health API should all channels use to access prescription information?]

Outcomes and Decision Points

Outcome: Documented current state landscape

Decision points:

- Key use cases to apply omnichannel methodology to
- Channels per use case

Learn/Research

- Discovery with existing product teams to understand their tech, needs, vision
 - VA Notify Team
 - UCC Team
 - VA Health Connect Team
- Discovery with API platforms and teams to understand what exists and what might need to be built
- Discovery of policy requirements (e.g., what do we need to do today?)
- Discovery of VA Health Chat vs. VAHC for care management with agent
- Identify WHAT of audio care do we want going forward
- Identify deltas between experiences
- Begin design of experience including in-person

Touchpoints/Products

- API Platforms:
 - VDIF
 - VIA
 - DIP
 - Lighthouse
 - DAS
 - VEText and VA Notify

- Audiocare
- Cerner
- Experience touch points:
 - In-person
 - Digital
 - Voice
- Products:
 - RX Refill App
 - RX Refill App
 - MHV
 - My VA Health
 - Audio Care
 - [VA.gov](#) and VA Mobile App (refresh of RX management)

Metrics

- Discovery of how Medallia surveys could be used to collect data on key metrics such as:
 - Increase Satisfaction
 - Increase Trust improve surveys
 - Effort score
 - Decrease transaction time
 - Decrease staff time on RX
 - Decrease call in, waiting time