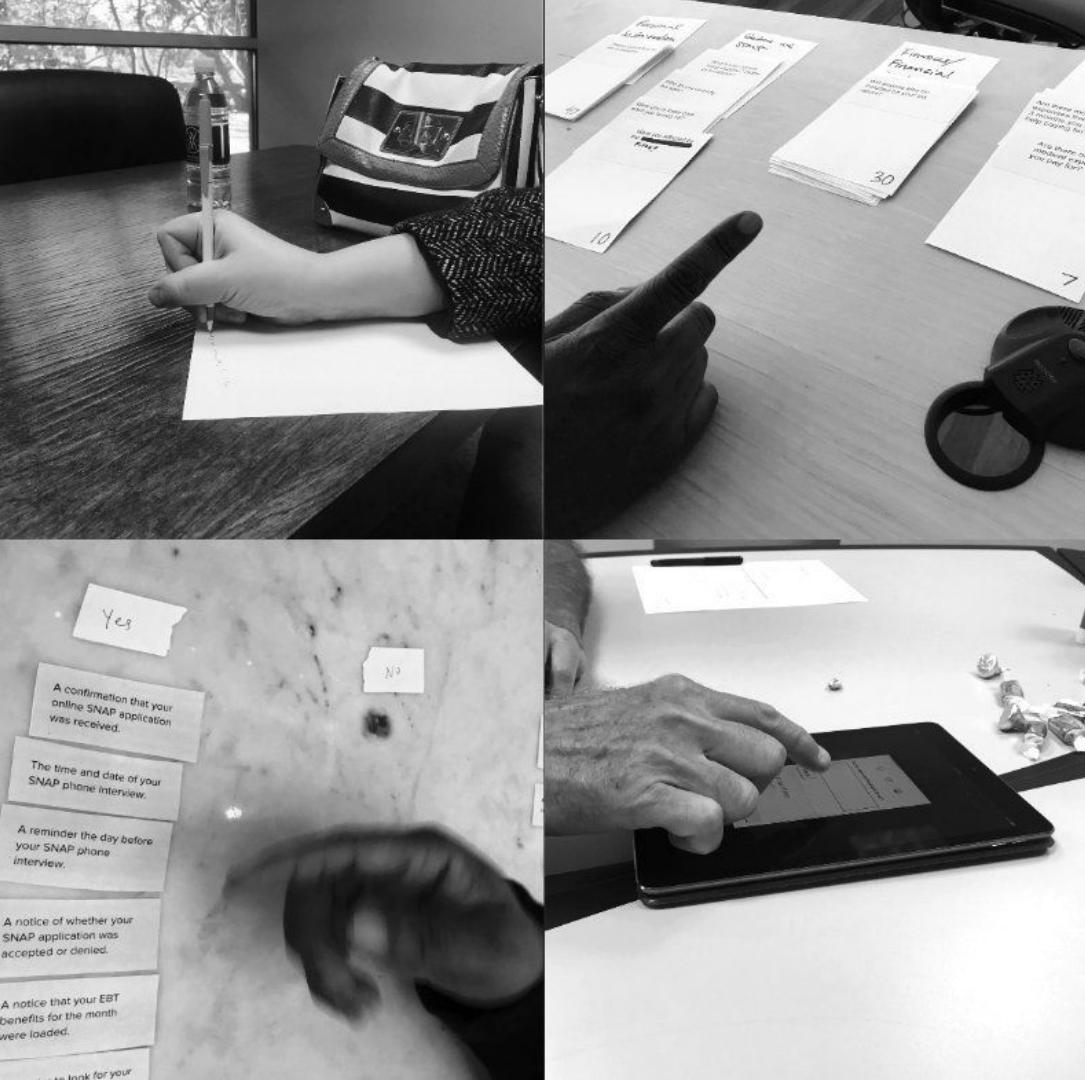


Selected design projects

RACHEL EDELMAN



Michigan Benefits

A ten minute application for Michigan's two largest public benefits programs.

Michigan Benefits

I designed a mobile-friendly combined SNAP & Medicaid application for a pilot program in Michigan.

The state already had an online application, but it was difficult to use and took 45 minutes to complete a joint application.

Project details

Over the course of 10 months, I collaborated with a product manager and a team of engineers.

My contributions included interaction design, copywriting, prototyping, and research.

The team's previous designer had created two separate Medicaid and SNAP flows. This, in addition to our partner Civilla's [paper form redesigns](#) formed the invaluable basis for my work.

USER NEED

Access and usability

Many clients rely on their phones for internet access, and may have limited data. The inability to submit documents on mobile is especially limiting.

The existing online application was confusing, long, and hard to use. Clients have limited time, and many are dealing with disabilities, caregiving, and multiple jobs.

"It's hard with two kids – getting on the bus and bringing them to the office. A lot of times they will interrupt. I need to be able to do this at home whenever my kids are sleeping."

- Client

"I spent \$8 faxing 14 pages because I couldn't get here to drop it off."

- Client

USER NEED

Figuring out families

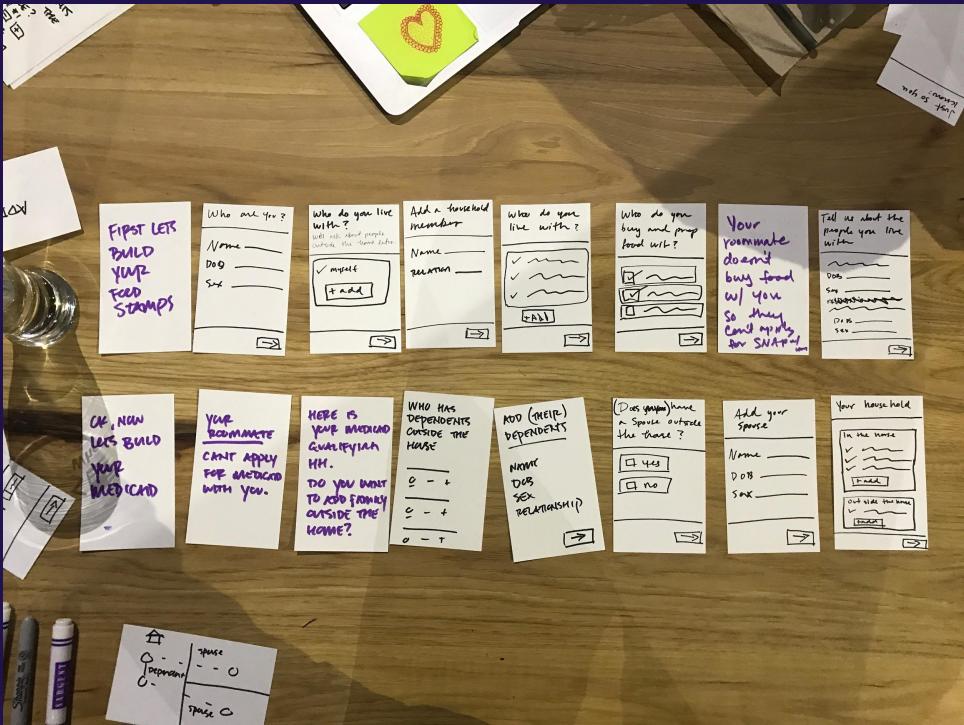
Household composition is the foundation of means-tested benefits. To determine eligibility, the right people must be on the application.

The rules for who is part of a household can be complicated. This is compounded in a combined application, where different programs define households in different ways.

Further, eligibility criteria is based on assumptions about traditional household makeup and stability that doesn't match clients' actual lives.

"If someone is missing from the case, everything changes. Residents may be getting more or less than they are entitled to."

- Caseworker



I started with the core of the application, the household builder. This was a period of intense iteration. I started on paper, with an index card for each question I thought might be in the application.

Collaborating with a product manager, I ordered and reordered them until we had a flow that I thought might work.

Set a Loading Screen
The screen that displays when launching your prototype

Apply for Food Assistance and Healthcare Coverage
Food Stamps and Medicaid

To start, please introduce yourself.

What's your first name?

What's your last name?

When is your birthday? January 15 1990

Set a Loading Screen
This screen that displays when launching your prototype

Who do you currently live with?
Tell us about everyone who lives in your home even if they're not there at the time.

You
 Add a member

Who do you want to include on your Food Assistance application?

You
 Add a member

Add a person you live with
Ask any questions about the answer to:

What's their first name?

What's their last name?

When is their birthday?

To start, please introduce yourself.

What's your first name?

What's your last name?

Are you married? Yes No

Continue →

household Builder 01 2 years ago

To start, please introduce yourself.

What's your first name?

What's your last name?

Are you married? Yes No

Continue →

household Builder 01a 2 years ago

To start, please introduce yourself.

What's your first name?

What's your last name?

Are you married? Yes No

Continue →

household Builder 01b 2 years ago

Who do you live with?
This includes everyone who lives in your home even if they're not there at the time. We'll ask about people outside the home later.

You
 Add a member

Every family is different.
Food Assistance and Medicaid calculate households differently.

We'll ask you questions about all the important people in your life.

Set a Loading Screen
The screen that displays when launching your prototype

First, let's build your Food Assistance household.

What's your first name?

What's your last name?

When is your birthday? January 15 1990

To start, please introduce yourself.

What's your first name?

What's your last name?

When is your birthday? January 15 1990

Every family is different.

Who do you live with?

Does everyone buy and make food together? Yes No

Who buys and makes food separately? Burton Guster Shawn Spencer Juliet O'Hara Carlton Lassiter

Who do you live with?
This includes everyone who lives in your home even if they're not there at the time. We'll ask about people outside the home later.

You
 Add a member

Who do you live with?
This includes everyone who lives in your home even if they're not there at the time. We'll ask about people outside the home later.

You
 Add a member

Since Juliet doesn't buy and prepare food with you, they will not be included in your Food Assistance application.

Who do you live with?
This includes everyone who lives in your home even if they're not there at the time. We'll ask about people outside the home later.

You
 Burton Guster Shawn Spencer Juliet O'Hara Carlton Lassiter

Who buys and makes food separately?
This includes everyone who lives in your home even if they're not there at the time. We'll ask about people outside the home later.

Burton Guster Shawn Spencer Juliet O'Hara Carlton Lassiter

Tell us more about your household members.

Okay, now let's build your Medicaid

Can anyone claim you as a dependent on their

Who can claim you?

I followed this with a series of clickable prototypes. I went out into the real world to test these, intercepting participants in benefits office lobbies.

Our research partners in Detroit conducted additional testing.

Tell us about your living situation.

Stable address

Temporary address

Homeless

Continue →

Who will you file taxes with?

List everyone who will be included on your federal tax return this year — even if they aren't applying for benefits today.

[Learn more](#) about who to include in your household.

- ✓ Burton Guster (that's you)
- ✓ Shawn Spencer ([remove](#))
- ✓ Juliet O'Hara ([remove](#))

+ Add a person

Continue →

What's their relationship to you?

They are my...

Choose one ▾

- Choose one
- Child
- Parent
- Roommate
- Sibling
- Spouse
- Unmarried partner
- Other

The final product is accurate, easy to use, and supports diverse family types.

It strikes a balance between support and flexibility, guiding users through the process.

Question order/ card sorting research

File Edit View Insert Format Data Tools Add-ons Help Last edit was on August 27

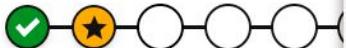
fx Current

	A	B	C	D	E
1	Current	Proposed <-----		P1	
2					
3	Welcome	Personal Information	Personal Information		
4	What's your name, date of birth, and sex?	Please confirm that you live in California	What's your name, date of b		
5	Please confirm that you live in California	What's your name, date of sex?	Provide your Social Security		
6	What's your current living situation? Stable or homeless?	What's your current living situation? Stable or homeless?	What's your mailing address?		
7	Who do you currently live with?	What's your mailing address?	Please confirm that you live		
8	Are you going to file taxes next year?	What's the best number for you to receive phone calls?	May we contact you by text		
9	Will anyone else be included on your tax return?	Your Household	What's the best number for		
10	Household Characteristics	Who do you currently live with?	Were you in foster care whe		
11	Are you married?	Are you going to file taxes next year?	Are you disabled?		
12	Are you a college student?	Will anyone else be included on your tax return?	Are you a college student?		
13	Are you pregnant?	Getting to know you	Who do you currently live w		
14	Are you expecting more than one baby?	Were you affected by the fires?	Are you married?		
15	Do you have medical bills related to pregnancy from the last three months?	Are you married?	Are you a veteran of the mil		
16	Are you disabled?	Are you a college student?	What is your citizenship?		
17	What is your citizenship?	Are you disabled?	Who would you like to be yo		
18	Are you a veteran of the military?	Are you a veteran of the military?	representative?		
19	Were you in foster care when you turned 18?	Were you in foster care when you turned 18?	Would you like to designate authorized representative?		
20	Are you currently enrolled in a health insurance plan?	What is your citizenship?	Living Situation		
	Are there medical expenses from the last 3		Do you pay for rent or a mo		

+ Results Final order v1 Final order v2 Branches

The application has many additional questions about income, expenses, and assets.

I ran a card sort exercise where I asked benefits recipients to categorize and order these questions. I used the results to redesign the flow, and group them into sections that better matched users' mental models.



Getting to know you.

Next, provide us with some personal details.

Continue →



Household bills.

Your expenses give us a clearer picture of your financial situation.

Continue →



Health and insurance.

Your health needs and expenses help determine what you're eligible for.

Continue →

The result was a series of “sign post” pages that keep clients oriented.

Insights from usability testing inspired a progress indicator to give applicants a sense of progress. Section descriptions help the user get in the right frame of mind to answer the questions that follow.

What kind of housing expenses do you have?

Check all that apply.

- Rent
- Mortgage
- Property taxes
- Homeowners or renters insurance
- None of the above

Continue →

Tell us about any rent expenses.

Monthly amount

\$

Paid for by

- Burton Guster
- Shawn Spencer
- Juliet O'Hara

Continue →

Do you have any separate utility expenses?

Only check utilities that are *not* included in your mortgage/rent payments.

- Phone (including cell phones)
- Heat
- Air conditioning
- Electricity
- Water/sewer
- Trash
- Other

Skip logic means users only see the information that's relevant to their situation.

There are many required questions, so I was careful to minimize the number of interactions necessary to complete the application.

Tapping is favored over typing.

Review your paperwork.

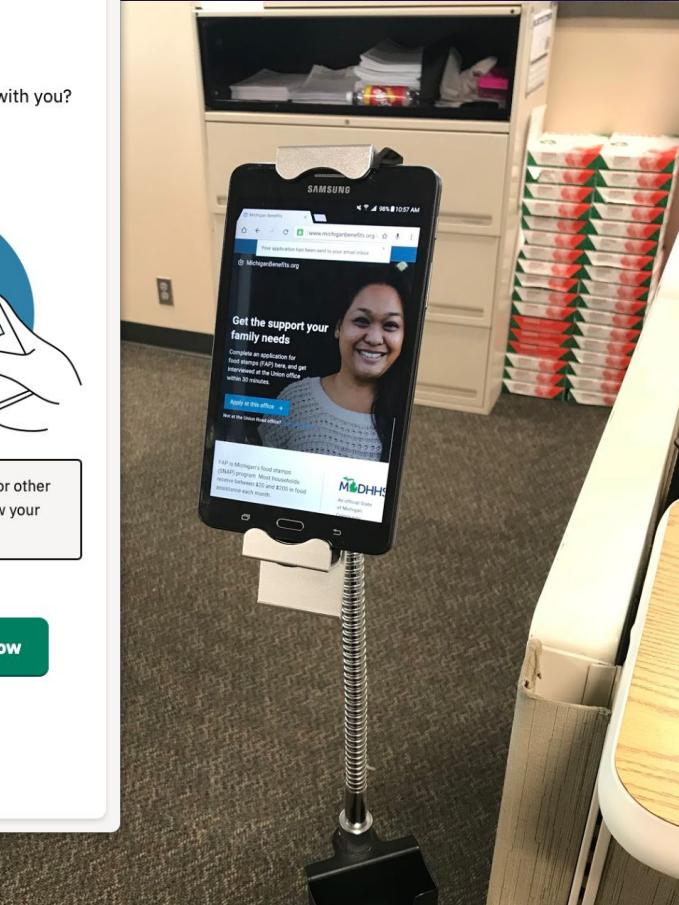
Do you have paperwork with you?
You can upload it now.



Your caseworker may ask for other paperwork after they review your application.

[Upload paperwork now](#)

[I'll do this later](#)



Although the app supported mobile document upload, we heard feedback that users weren't using this feature.

I added an illustration to encourage users to take pictures of their documents with their phone.



Testing paper prototypes.

Impact

10 minutes

Time to apply, down from 45 minutes

2 days

Reduction in days to determination

18%

Increase in approval rates

ClientComm

A messaging app to decrease recidivism.

ClientComm

I designed a suite of features for a web-based app that allows community supervision officers to text their clients from.

6.7 million people are under community supervision, which includes parole, probation, and pre-trial. We served thousands of them through this product.

Our goal was to increase clients' chances of successfully completing their supervision, and to "keep people out of jail for bulls**t."

Project details

Over the course of a year, I collaborated with a product manager and a team of engineers.

My contributions included interaction design, prototyping, and research.

I joined the team after a major refactor of the original app. Many features had been removed and needed to be redesigned.

USER NEED

Avoiding technical violations

Community supervision comes with a long list of rules, including curfews, check-ins, and drug tests.

Clients must comply with these demanding terms for months or years.

Failure to comply with these terms can lead to “technical violations”, which can result in a return to jail or prison.

“Some of [our clients] have a lot of stuff to get done. It could be really easy to lose track of their obligations. I mean, I’ve got some single moms with five kids! It would so helpful if they could figure out what they need to do.”

- Officer

USER NEED

Facilitating communication

Clients are difficult to reach. Many use prepaid phones and run out of minutes for calls.

Clients also struggle to get in touch with their supervising officers, who may not always be able to answer their phones.

The stakes are high. Being able to let your supervising officer know that your childcare fell through or your bus is stuck in traffic can be the difference between rescheduling a check in, or accruing a violation.

“Sending an email gets a 5% response... a call 3%... I get 90% response via text.”

- *Officer*

“We used to play phone tag all the time [before ClientComm].”

- *Client*

INSIGHT

Building better relationships

Officers are burdened with high caseloads. They don't have the time to give their clients individual attention.

The result is a focus on compliance, not support.

"I love ClientComm. It's a fabulous tool. When I used to come in prior to ClientComm I would have 20 messages and I would put my head on the desk and say "I can't deal with this."

I was in court all day on Friday and I came in and I had 7 ClientComm messages and 2 voicemails. So much easier to handle. I use ClientComm for just about everything."

- Officer

My clients

+ New client Mass message

Search clients by name

▼ Name

▼ Last contact

★ Jessica Smith just now

☆ Elinore Koss 3 hours ago

★ Nels Koeppe 3 hours ago

★ Khalid Schamberger 4 hours ago

☆ Gaetano Kuphal 1 day ago

★ Adeline Jacobi 1 day ago

☆ Katlynn Green 1 day ago

☆ Kaylee Erdman 2 days ago

☆ Zelma Schmeler 2 days ago

☆ Edd Witting 2 days ago

ClientComm

Menu

My clients

+ New client

Mass message

Search clients by name

▼ Name

▼ Last contact

Jessica Smith just now

Elinore Koss 3 hours ago

Nels Koeppe 3 hours ago

Khalid Schamberger 4 hours ago

Gaetano Kuphal 1 day ago

Adeline Jacobi 1 day ago

Katlynn Green 1 day ago

Kaylee Erdman 2 days ago

Zelma Schmeler 2 days ago

Edd Witting 2 days ago



I designed a mobile responsive homepage for ClientComm

Officers can see their caseload at a glance. Next I designed search, sort, and categorization features allow them quickly find the right client.

"I've been in pretrial supervision for 30 years and in that time there are **two momentous developments that have truly changed the landscape of pretrial services**. The first was getting instant access to criminal history many years ago and **the second is ClientComm.**"

- Bob Weisengoff, Executive Director of Baltimore Pretrial Services

Deactivate client

When a client leaves your caseload you can deactivate them from your contact list. If they send you a message later they will automatically return to your contact list.

What was the outcome for this client?

- Successful closeout
- FTA
- Supervision rescinded
- Case still open / not applicable

Deactivate Hope Rowe

Merge duplicate clients
You can combine this client with another client record.

Pick client

Transfer Client
Transfer Hope Rowe to another user. Your conversation history with Hope will not be transferred.

Transfer to

Pick user

Include a note to be emailed to the new user (optional)

Transfer Hope Rowe

Jurisdictions already had case management software that ClientComm wasn't able to integrate with.

Our app needed enough contact management capabilities to be useful, but still be simple enough not to add to officers' workload.

I designed features to import, merge, transfer, and deactivate clients, as well as tools to download transcripts and create minimal case notes.

[← Home](#) **Jeff Reverez**
(555) 555-5555 [Manage client](#)

I understand.

received 3/28/18 at 11:50am

Don't forget, the resume workshop is tomorrow! Bring your first draft, and meet in the computer lab.

delivered 4/1/18 at 04:00pm

 **flyer.jpg**

Thanks for coming to the workshop! Here's the tip sheet.

[Send](#) [Send later](#)

Officers can send and receive images.

40% of images from clients were documentation, like receipts for classes or proof of community service. This removes the burden of having to bring paperwork in to the office or access a scanner.

We also found that 32% of images were more personal: selfies, clients' children and pets, graduation photos. This is an unexpected way that ClientComm facilitates relationships and fosters trust.

[← Home](#)

Jeff Reverez

REVEREZ

[Manage client](#)



You haven't sent Gerald any messages yet. Start by introducing yourself.

This is a reminder of our appointment tomorrow at 10am, lasting one hour. The address is 155 9th Street (between Mission and Howard). Check in at the front desk when you get here and ask for me. Thanks.

delivered 4/1/18 at 04:00pm

I'll be there

received 4/1/18 at 04:00pm

My job interview went really well! I think I have a good shot at it.

received 4/1/18 at 04:00pm

Send a text message

Contgratulations!

That's great!

Keep up the hard work.

I appreciate it.

"Evidence-Based Practices" are approaches proven to increase positive outcomes in criminal justice.

A major focus for us was the EBP principle of "positive reinforcement". I designed features to nudge officers to send more positive messages.

My job interview went really well! I think I have a good shot at it.

received 4/1/18 at 04:00pm



We saw indicators that positive reinforcement increased in the messages the test group sent.



Increase in “Congratulations!” messages in a pilot site, month over month.

“Some Evidence-Based Practice was in place before ClientComm came along...but we've had **more emphasis since ClientComm on positive messaging and interaction with clients**. If your client could only leave you a voicemail...who is going to leave a voicemail saying “*I relapsed*”? You only see them in person once a month and if the [drug test] doesn't come up as positive, you don't know if they're having a problem. **But now there's a constant relationship because of ClientComm.**”

- Officer



A user at work.

Impact

5 hours

Time saved by
officers a week

64%

Reduction in
rearrests in Salt
Lake County

Report Changes Colorado

Giving clients the tools to manage their benefits case.

Report Changes Colorado

For a pilot program in Colorado, I designed a tool for benefits recipients to report changes in their income.

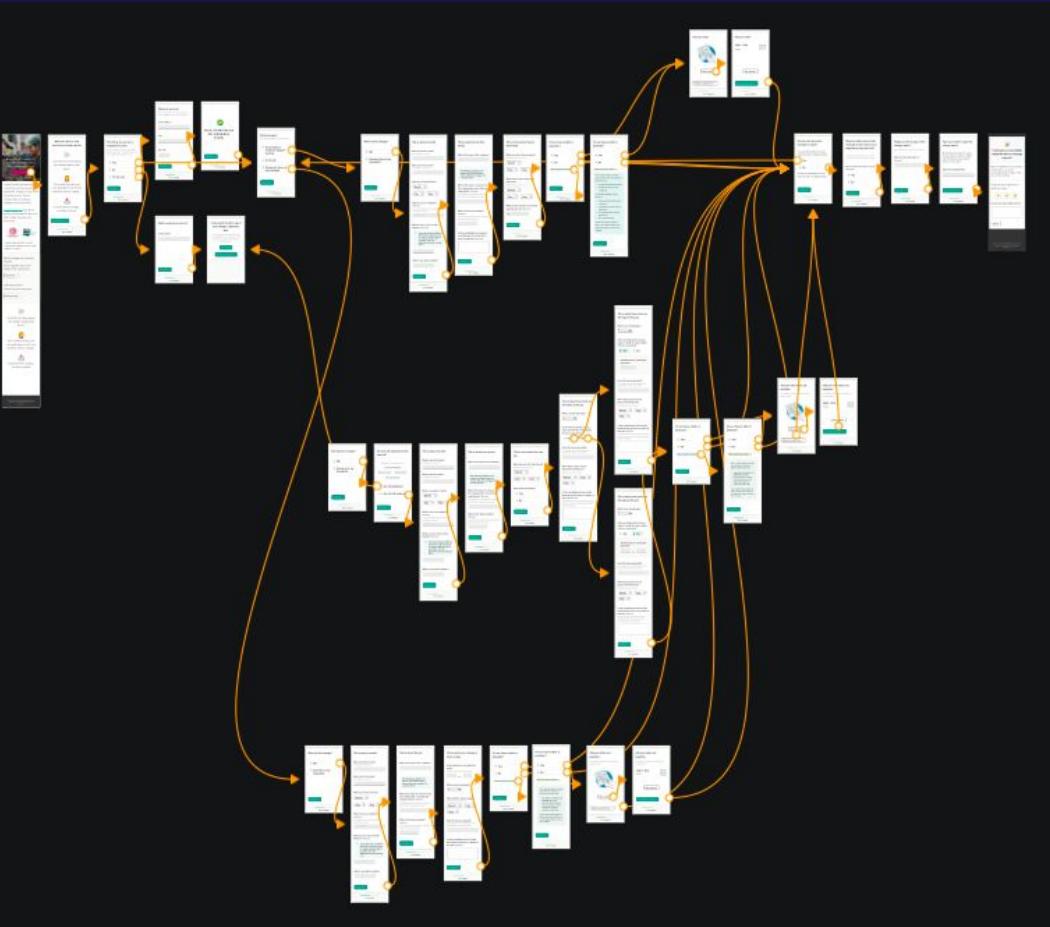
The state has an online portal for clients to manage their cases, but it was underutilized. Clients had difficulty reporting changes, and caseworkers struggled to process reports that lacked crucial information. Usability issues resulted in many duplicate reports being submitted.

Project details

Over the course of a year, I collaborated with a product manager, a team of engineers and research contractors.

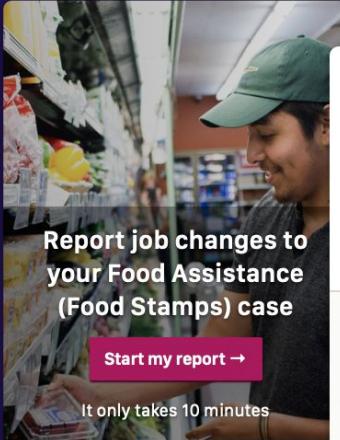
My contributions included interaction design, copywriting, prototyping, and research.

My work built on research conducted during a prior discovery phase.



We developed the product with an Agile approach, starting with a single change type, a single supported program, and support for a single county. In following releases, I expanded each of these.

I iterated the user flow many times as the product grew in complexity.



If your income increases by a certain amount you need to report the change to your Food Assistance case. If your income falls, you may be eligible for more benefits.

[Start your report](#) now. We'll guide you through the process with simple step-by-step directions.



In partnership with the Colorado Department of Human Services and Arapahoe County.

Which changes do I need to report?

You're required to report some changes. Others are optional.

[Learn more](#)

Other questions?

Contact your local county office.

[Find my county](#)



Fill out a form about the change and provide proof.



The **county reviews** your case and figures out if your benefits need to change.



You **get a letter** in the mail telling you if your benefits will change.

I set client expectations up front with an estimated completion time, a timeline of report processing, and a plain language description of change reporting.

The interface is friendly and inviting. Government seals add trustworthiness.

This is a service delivered by Code for America on behalf of the people of Colorado.

It's time to provide proof of this change.

Your change report can't be processed without proof. The best way to prove that a job ended is:

- A paystub showing your **pre-tax** earnings
- An offer letter saying how many hours you will work and how much you will earn

You should try to get one of these, but if you can't, we'll work with you to find other ways to prove this change.

Continue →

50% complete

What do you have?

I have an offer letter

I have a paystub

I don't have either of these

Continue →

60% complete

How can we contact this employer?

Someone from the county may call your old employer to verify your job.

What is the name of the supervisor or manager the county should contact?

What is their phone number?

Is there anything the caseworker should know before they talk to your old employer? *Optional*

Continue →

70% complete

Verifying income changes was a major pain point for clients.

Although caseworkers were willing to accept collateral contacts (the word of someone who can vouch for the change), the state's existing tool had no way to collect this information.

I designed a collateral contact flow and found that given the chance, clients were more likely to submit this information than traditional verification documents.

1: Unguided

Make changes to your case.

My address

123 Drury Lane, Denver,
Colorado 12345

Edit this

My phone number

(555) 555-5555

Edit this

The people in my household

- Burton Guster
- Juliet O'Hara
- Shawn Spencer

Edit this

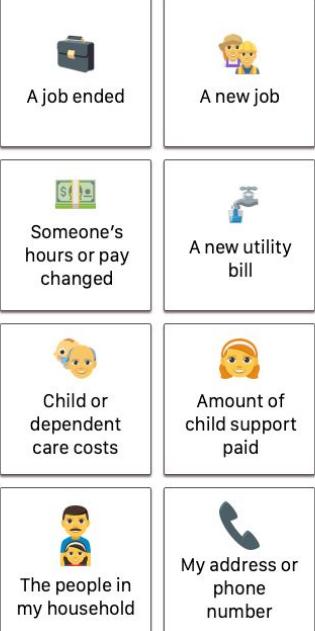
Jobs

Person
Burton Guster

Job
Acme Inc

2: Semi-guided

Tap your changes



Continue

3: Guided



Do you still make
\$400 a month at
Acme Inc?

Acme Inc
10 hours a week
\$10/hr

Yes No

Although we had run the usual usability tests on our product, I wanted to more fundamentally understand users' mental models of reporting a change.

I designed a series of prototypes embodying three different approaches. Collaborating with a researcher, I had clients rate them on a number of metrics related to usability, confidence, and whether it felt overbearing or empowering.

Tell us about yourself.

Issue: too many required fields, especially SSN.

Solution: make phone number optional. The other fields are necessary for caseworkers to reliably identify clients.

The upside of fewer required fields is overshadowed by the downside of submitting reports that can't be processed.

Old

Please read your Rights and Responsibilities.

By completing and signing the State of Colorado Application for Public Assistance and other documents required to determine whether I'm eligible for food assistance AND by accepting benefits that I may receive therefrom, I agree to the following:

I have agreed to submit this application for myself and/or my family. By signing this application electronically, I certify that I have read this application, that I understand and agree to the Rights, Responsibilities and Obligations set forth in this application.

By checking this box and typing my name below, I am electronically signing my change report.

Type your full legal name

Sign and submit →

New

Please read your Rights and Responsibilities.

By reporting a change for a household member, answer these questions about them.

What is your full name?

What is your date of birth?

What is your social security number?

What is your phone number?

What is your case number?

Optional

You can find this on letters that the county has sent you.

Terms & Conditions

Issue: T&C and signature are outdated/not required.

Solution: Remove T&C and signature.

Alternate solution: write a more generic statement to sign ("I promise I am telling the truth etc").

Old

Please read your Rights and Responsibilities.

By completing and signing the State of Colorado Application for Public Assistance and other documents required to determine whether I'm eligible for food assistance AND by accepting benefits that I may receive therefrom, I agree to the following:

I have agreed to submit this application for myself and/or my family. By signing this application electronically, I certify that I have read this application, that I understand and agree to the Rights, Responsibilities and Obligations set forth in this application.

By checking this box and typing my name below, I am electronically signing my change report.

Type your full legal name

Sign and submit →

New

Sign your change report.

By checking this box and typing my name below, I am electronically signing my change report.

Type your full legal name

Sign and submit →

We were in constant negotiation with our government partners. I balanced their policy concerns with advocacy for the user experience.

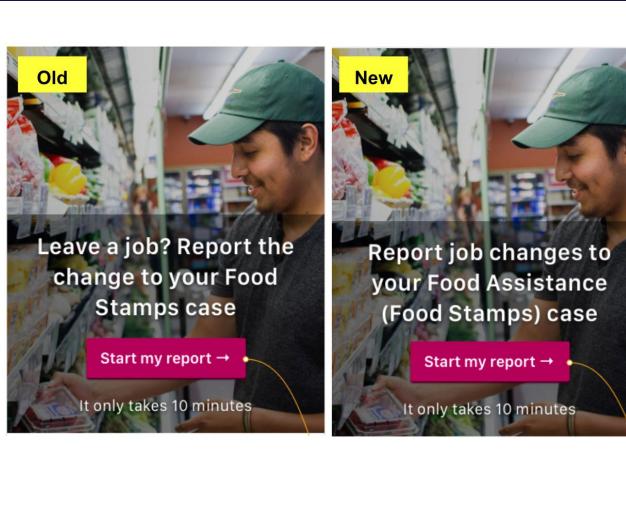
These slides are from a report back to my team, showing design iterations following feedback from the Colorado Department of Human Services.

Homepage

Issue: Food Stamps is outdated name, want to call it Food Assistance

Solution: use "Food Assistance (Food Stamps)". Our primary goal needs to be effective communication with users.

There are real branding issues here, but addressing them are out of scope.



Old

 Head of Household: Eliseo Ackland
Submit Date & Time: 05/03/2019 6:28 AM
Tracking Number: 2062716825 Case N

Log in to your PEAK Account today to begin managing your benefits.

Your change report has been submitted. You do not need to mail this form.

Your tracking number is 2062716825.

Your case number is 1B [REDACTED].

Help from Others

You have told us that no one helped to fill this application

Changes Reported

Household Information

Address Information Summary

Household Information

Does this change apply to everyone in the household?

I have no home address/I am homeless right now. **No**

What county do you currently live in? **Fremont**

Does your household get housing or rent assistance? **No**

If your household gets Public Housing Assistance, do you get a separate bill for utilities? **Yes**

Where You Live Mailing Address

Loc Program Type : Medical Assistance

Contact Information

Home Phone Cell Phone

719-[REDACTED]

Message/Work Phone Message/Work Type

Email Address Notification Method

New

Change Report



Submit Date & Time	Head of household
05/02/2019 7:22 AM	Inocencia Hansel
Tracking number	Phone number
9062716799	(555) 555-5555

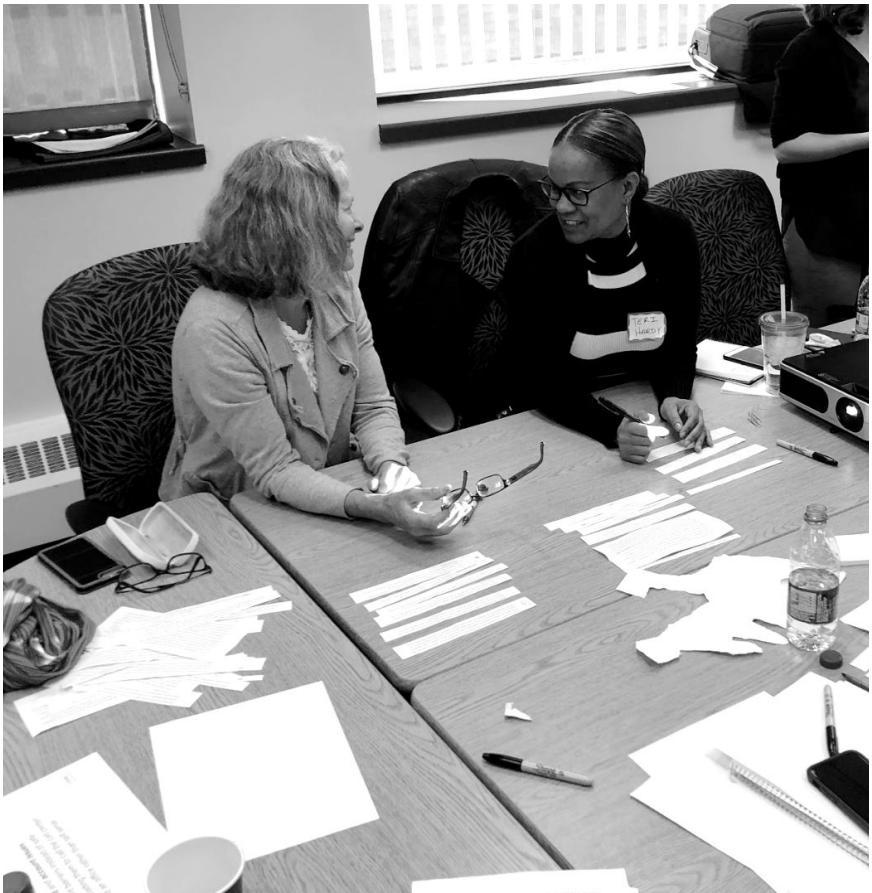
Category	Change type	Household member
Household	Marital status	Inocencia Hansel
Household	Mailing address	Household
Income	New job	Inocencia Hansel
Income	Unemployment insurance	Inocencia Hansel

Change type	Person
Household: marital status	Inocencia Hansel

Details	Old	New	Black indicates changes
Date of change	--	04/01/2019	
Marital status	Single	Married	
Continue Coverage through QHP or CYA	No response	No response	

Although our partners weren't able to immediately incorporate our design approach into their existing product, there was an opportunity to improve the PDF output that caseworkers process.

I redesigned this form for scalability and ease of use.



Colorado State staff at a Design Principles workshop I helped run.

Impact

0

Duplicate reports submitted
during the pilot

30%

Increase in client satisfaction
metrics

Thank you.

edelman.rl@gmail.com

racheledelman.com