KENTUCKY CABINET FOR HEALTH AND FAMILY SERVICES

Human Centered Design Journey for Kynect Self Service Portal

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Approach Summary

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High Level Approach



Scope



Discover

Research



Define

Synthesize & Plan



Design/Deliver

Iterate, Build & Test



Support

Implement

INNOVATION ····· **IMPLEMENTATION**

Getting the right idea

Gather and consolidate knowledge, needs and requirements on which to base a strategy and/or design and system. *(Who are we designing for, why and what is the problem we're solving).*

Develop the foundational components of the solution to serve as the basis for detailed design and development work.

Incrementally design and implement a user/customer experience (starting with the most valuable, risky, or complex deliverables) to the point that it's ready for a launch, deployment or delivery to the client.

Draw from user input, project metrics, analytics and client requirements to continually develop and enhance system or the customer/user experience.

Launch/release and prepare for future improvement and/or maintenance. This includes support training and fast-follow improvements.

Getting the idea right

Discovery

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Discovery Phase	Description
Stakeholder Interviews	Conduct CHFS stakeholder interviews to better understand ambitions, goals, challenges, and obstacles for a successful design of SSP
Define Program Objectives, Problem Statements, and Definition of Success	Collaborate with CHFS stakeholders, through a workshop(s) to clearly define SSP re-design Objectives, Problem Statement, and definition of success
Develop User Research Plan and Schedule	Research plan that articulates schedule, number of interviews, location of interviews, and deliverable schedule
Conduct User Research	Generative research to gain insights as to user problems and opportunity areas
Hold Research Immersion Workshop	Workshop to provide stakeholders with research findings summary and objective understanding
Develop Design Execution Plan and Roadmap	Develop comprehensive design delivery plan and roadmap
Hold Design Reviews	Conduct design review sessions to solicit stakeholder interviews
Conduct Usability Testing of Visual Designs / Prototypes	Conduct user testing of designs to solicit user feedback for consideration for re-design of screen

Design

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Design Phase	Description
Branding exercise	Assist with re-design of the SSP logo, color palette, creation of recommendations for suggested SSP branding and marketing directions. Direction and examples of content voice, tone, and style; and recommendations on logos, taglines
Launch Plan	Create website launch plan with all assignments, action items and timelines.
Promotional Campaign	Create and assist in execution of the website promotional campaign to increase awareness of changes, set expectations, and gain public confidence and trust.
Visual design conceptual executions with selected direction UX wireframes	Visual renderings of fully designed, key user interface screens or flows focused on primary interactions within SSP
Style guide / Pattern library	Detailed color palette and design elements associated with design executions
Usability testing results	Results of user testing to understand user navigation and usage of visual and user experience design to be placed in the backlog for future inclusion design executions



Design Approach

HOW RESEARCH INFORMS DESIGNS CONCEPTS

Design Concept Inputs

Over the past few months, Kentucky strategic goals, quantitative data, benchmarking data, and previous qualitative research are among sources of information that has been used to inform design concepts. Other key considerations include:

- Mobile First Strategy/Responsive Web Approach
- Simplified Language – National Plain Language & 6th Grade Reading Level
- Improved Layout (SalesForce Platform Customization)
- Understood Areas of Improvement
- Innovation Concepts
- Education Level Considerations

SNAP Universal Truths
PREVIOUS RESEARCH

Benchmarks
PEER STATES IN US

Heuristic Evaluation
CURRENT SSP ANALYSIS

Best Practices
DIGITAL EXPERTISE

Functional Team
CURRENT SSP

User Research
EVALUATIVE & GENERATIVE

Client Feedback
NEXT

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Enhanced Design Considerations

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Mobile First, Accessible, and Responsive

Improve flexibility and boost adoption by enabling citizens to complete and manage benefits applications through a mobile device

Reliable, Tried and True

Incorporate tried and true techniques implemented on similar state SSP projects on benefind

Easier, Faster, Delightful

Increase user efficiency with an optimized, user application flow by grouping modules in intuitive modules

Informative and Actionable

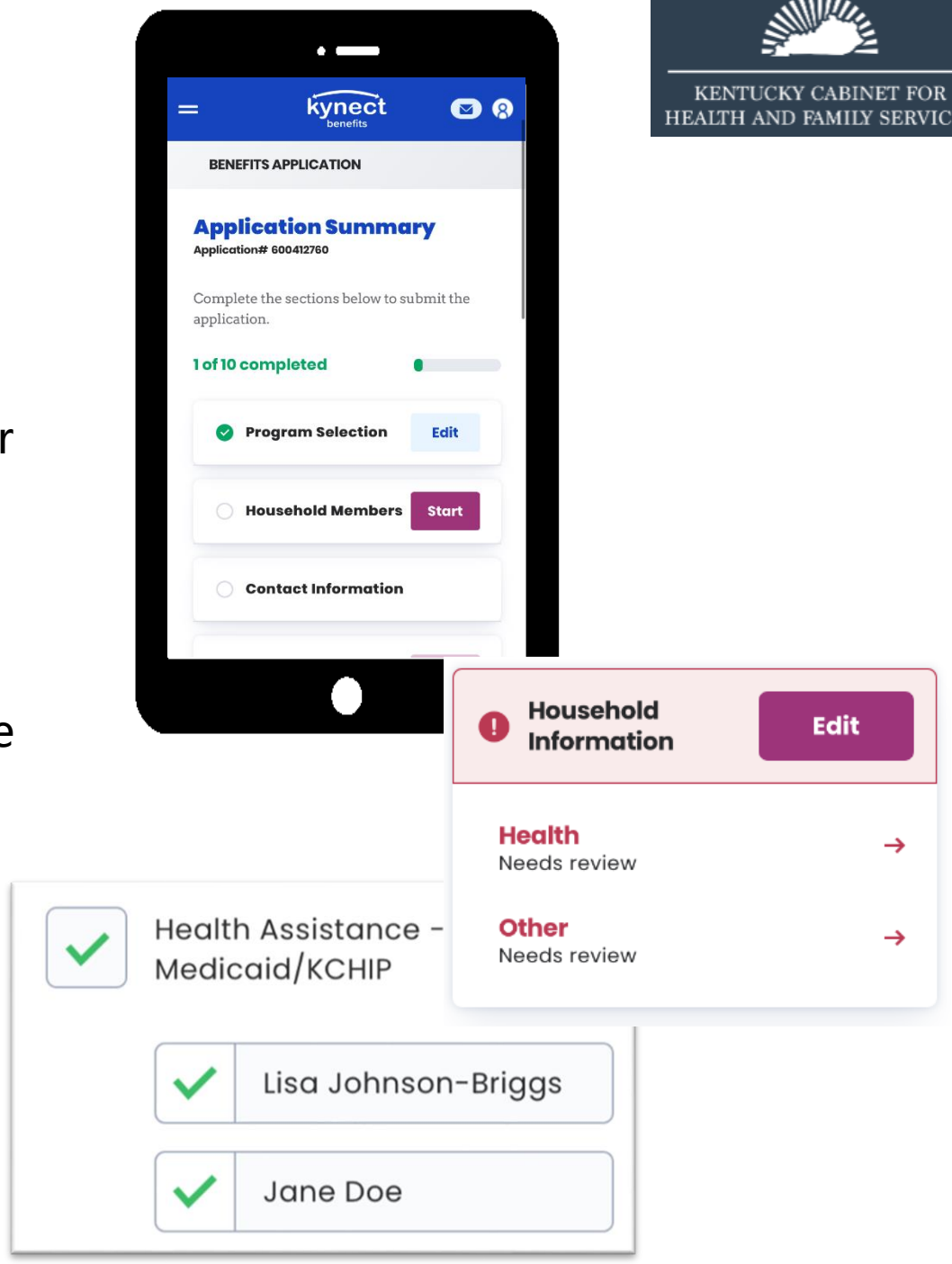
Display important next steps for users by emphasizing them up-front on the user's benefit dashboard

Understandable and Explanatory

Reduce user confusion and improve application accuracy by using content that follows Federal Plain Language Guidelines and appropriate tone

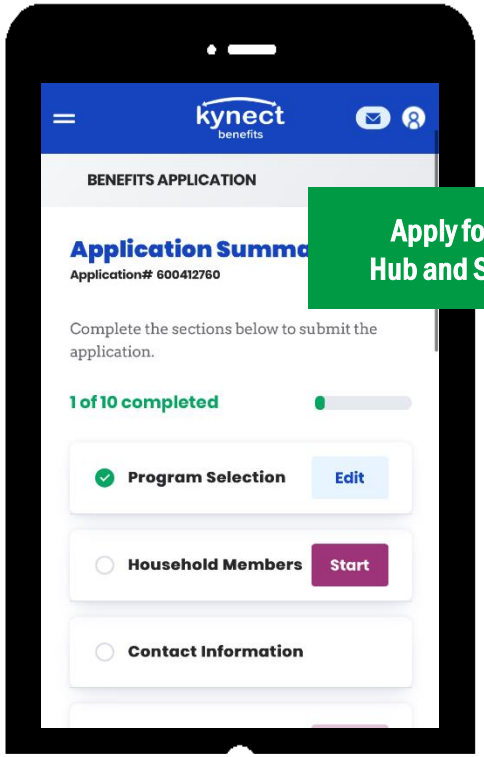
Mobile First Considerations

1. Touch friendly control which are easy to tap on.
2. Mobile centric screen layouts with simpler and shorter page layouts to avoid excessive scrolling.
3. Space efficient input elements for optimal mobile device rendering.
4. Mobile responsive behavior on browsers with multiple form factor.
5. Extensive testing across different mobile form factors.

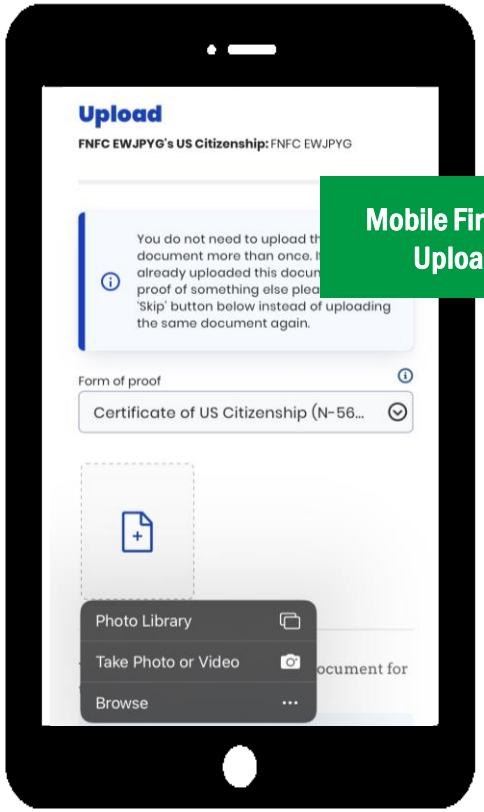


Human Centered Mobile First Considerations - Examples

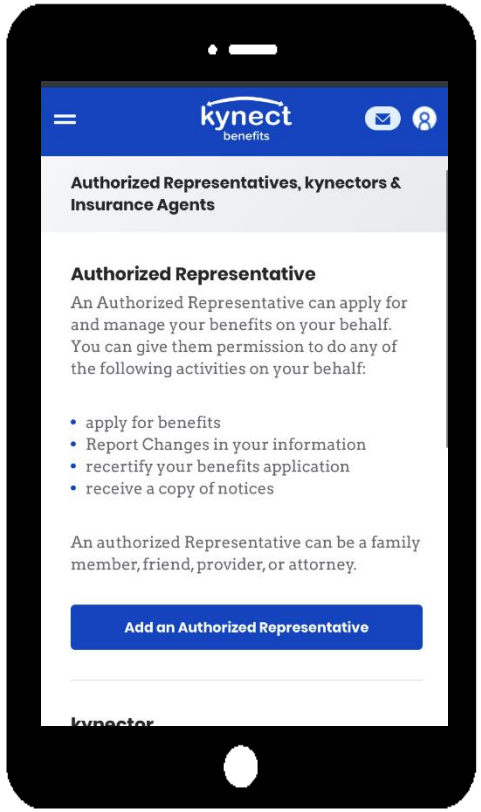
Human Centered Mobile First design comes with key functional improvements based on research. Interviewing actual users is a key part of the process instead of designing based on perceptions of SMEs. Example: If a module is used by a Case Worker, they should be part of the research interview sessions.



Apply for benefits!
Hub and Spoke Model



Mobile First Document Upload Wizard



Find kynectors and other help!





Evaluative Research

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User Research: Evaluating Design Concepts

The goal of evaluative research is to test a design concept and evaluate how it performs at meeting user needs. The research team will leverage the design concepts to test three key activity flows with users. This will provide additional learnings and insights to further inform the design team. This effort will focus on Assisters and Partners (and if possible Customers) to increase feedback times and keep schedules aligned.

Key Activity Flows	***Check Eligibility*** →	**Applying** →	**Managing Benefits** →
What we need to learn	*How users understand calls to action.* *How users understand the overall flow.* *What users expect to achieve through this flow.* *What information is helpful to the users in the flow.* *What's the best way to design eligibility to easily enable customers to successfully understand what benefits they are eligible to receive.*	*How users engage the application process.* *How users perceive their progress in the application.* *How questions/inputs groupings & hierarchy reduce cognitive load.* *How content structure and reading level improve application competition.* *How notifications & feedback assist users in completing the application process.*	*How users better engage dashboard features in managing benefits.* *How users are able to accomplish tasks in dashboard.* *How users may use tools and interface effectively.* *How to better enable users to meet compliance requirements, in a timely manner, to retain benefits.*
We want to evaluate:	• *Navigation activities* • *Process clarity* • *Ease of use*	• *Process clarity* • *Simplified interface* • *Usability success*	• *Increased task efficiency* • *Lessening burden* • *Drive notifications and awareness*
Research Participants:	***20 – Assisters/CSR***		
	10 – Beneficiaries (Users)/Partners		

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Evaluative Research Planning & Recruitment

Recruitment planning and strategies for evaluative are primarily influenced by maintaining the overall project timeline. While past research efforts have leveraged formal recruitment firms, they require a six week planning period. We have chosen strategies to leverage networks to gain access to participants as efficiently as possible while maintaining research standards and quality data.

	Assisters	Customer Service Representatives	Partners	Beneficiaries/Users
WHO				
WHY	**Assisters are extremely familiar with the end user and system.** Additionally, they are a user of the system in some scenarios. They are accessible for research and can help us maintain our timeline.	**Customer Service Representatives field front line calls to help SSP users troubleshoot issues.** Their perspective and familiarity with the user context when calling for help will be useful data in concept evaluation.	**Partners play an important role in helping users navigate Benefind and maintain trusting relationships with users.** Gaining their thoughts on SSP design concepts can inform future iterations and improvements.	**Beneficiaries are the primary users of the system.** Their feedback is most valuable in evaluating the design concept contribution to successful self service.
APPROACH	Leverage references and recruiting from the network of assisters across the Commonwealth.	Recruited through the internal request for meeting and interview.	Partners are being recruited through referrals provided by Commonwealth referrals.	DCBS Offices are providing space to conduct research with beneficiaries/users. As practiced before, a small gift card will be provided as incentive.

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Evaluative Research Schedule

	8/19	8/20	8/21	8/22	8/23
WK 1	**M**	**T**	**W**	**TH**	**F**
Focus: Assistors	Field Research Preparation Research Recruitment		Field Research Hopkinsville 18 Assistors COMPLETE	Covington 15 Assistors COMPLETE	◆ Research Insights Summary

	8/26	8/27	8/28	8/29	8/30
WK 2	**M**	**T**	**W**	**TH**	**F**
Focus: Beneficiaries & Customer Service Reps	Research Recruitment Field Research Preparation Research Synthesis		DCBS Office Visit – Jefferson Co. COMPLETE CSR Interviews COMPLETE	Research Synthesis ◆	Research Insights Summary

	9/2	9/3	9/4	9/5	9/6
WK 3	**M**	**T**	**W**	**TH**	**F**
Focus: Partners and Beneficiaries	LABOR DAY	DCBS Office Visit - Fayette Co. COMPLETE	DCBS Office Visit - Hardin Co. COMPLETE	Research Synthesis ◆	Evaluative Research Results

◆ Milestone/Deliverable



Generative Research

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Generative Research Approach Overview

We will research users in the field, synthesize learnings, and generate concepts which can be leveraged by many stakeholders in the delivery and improvement of SSP.



Activity:	**Align on Research Participants**	**Recruit & Conduct Field Research**	**Synthesize Research & Create Artifacts**	**Conduct Immersion Workshop**	**Package & Deliver Insights**
Description:	Align on approach to generative research personas.	Recruit research participants and involve key stakeholders in field research.	Synthesize research data & create five personas & a journey map representing themes.	Immerse leadership & key stakeholders in research with personas & journey maps to generate concepts to enhance SSP.	Package and formalize the concepts and insights in a report and deliver to client.
Outcome:	• Decision on 5 personas to research	• Primary research data. • An understanding of HCD & Customer among stakeholders	• 5 personas based on research inputs • 1 journey map based on research inputs	• Expose research to larger audience • Concepts to enhance SSP informed by HCD	• A research insights report of concepts for enhancements
Roles & Participants:	• Core project leadership team • HCD Research Team	• Core project leadership team • Key project stakeholders • HCD Research Team	• HCD Research Team	• Core project leadership team • Key project stakeholders • HCD Research Team	• HCD Research Team • Core project Leadership Team

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Understanding the Self Service Journey

Our goal is to understand the **beneficiaries' service experience holistically** to identify opportunities for enhancement.



The Process	Finding help →	Applying →	Managing Benefits →	Exiting →	Renewing →
What we need to learn	*How do people find out about resources/ services and eligibility?* *What environmental factors inhibit awareness or access?* *What motivates people to want to engage with this service?*	*What emotions are at play when applying for benefits?* *What barriers and challenges exist to completing this process?* *What are the pivotal moments that impact users the most in this phase?*	*What factors keep people from successful engagement?* *What are the pivotal moments that impact users the most in this phase?* *What keeps people engaged through application and on-going updates?*	*What emotions do people experience after engaging with digital portals?* *What does a successful digital interaction look and feel like?*	*What resources are available to people to assure their continued success?* *How and why are people engaged after they exit the digital interaction?*

What role do service providers and partners play in the user journey?

Our goals for the user experience	• Navigating awareness • Making process clear • Overcoming distrust	• Make it easier • Providing control • Reducing complications	• Easing friction • Lessening burden • Increase accessibility	• Ensuring security • Confidence in next steps	• Proactive engagement • Making smart habits persist
Research participants we want to talk to	A**t the start** of the customer journey	Those who have recently **qualified and applied**	Those who have **experience** using SSP	Those **who are transitioning off** SSP	Those who have **on-going experience**

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Generative Research Methods

We will use a mixed method approach to engage the field of study, which includes ethnographic research, interviews, and other qualitative methods. We recognize and welcome the participation of staff and stakeholders in this journey of discovery.

Methodology

To accelerate generative field research, we will use a **snowball sampling** methodology to re-engage partner and assister evaluative research participants. Drawing on these **trusted networks** to identify beneficiaries/users, we will expand the sample outwardly from these first cases.

Ethnography

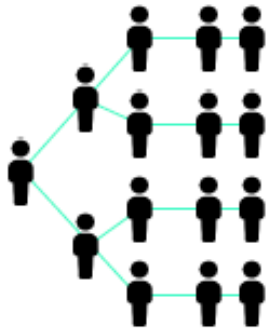
On-the-scene learning to examine and interpret participant actions and behaviors in natural settings (e.g. communities, homes, DCBS offices, partner locations).

In-depth interviews

Semi-structured interviews in an open-ended format with fluid question set to explore how users currently enroll, make changes to their accounts, and manage their benefits.

Participant Observations

Unobtrusive data collection within spaces where beneficiaries can be found (e.g. DCBS offices, partner and assister locations) to observe interactions and the emotional journey.



Snowball sampling example

Paired Field Research Team

We will deploy 'research pairs' into the field in which an **HCD research lead** is accompanied by one **account or stakeholder staff**, per participant.

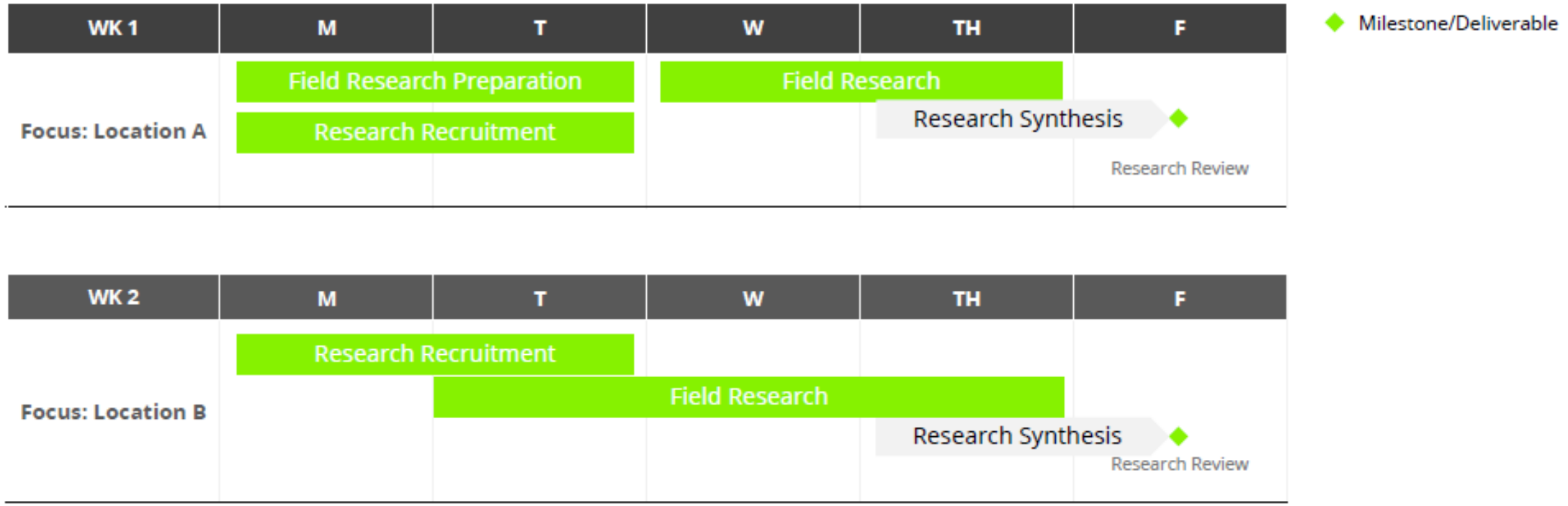
Beneficiary/User Participant

Human-Centered Design Research Lead

Account or Stakeholder Co-Researcher

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Notional Generative Research Cadence



- Each research review meeting will serve to **align teams** on **preliminary findings** in the field and help to inform **design concepts**. Research review meetings are intended to review our progress **as it evolves**, and not final findings.
- ***This schedule is notional to illustrate the planned cadence for generative field research activity. Dates, participant groups, and locations are to be determined.***



Heuristic Evaluation Overview

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Heuristic Evaluation Overview

The 4 major focus areas of this evaluation are Context, Consistency, Competence Match, and Clarity. In addition to a general review of each, recommendations are provided in order to guide SSP design.

Context: Does the user know where they just were, where they are now, and where they need to be? Does the UI reduce uncertainty? Can the user react instead of having to remember?

Competence Match: Do the language and task requirements meet the literacy level and semantic understanding of the user in such a way that allows them to complete tasks?

Consistency: Are the choices made in the UI, language, navigation, prompts, and other areas consistent throughout the system?

Clarity: Is the information provided enough to be clear, but not excessive? Is it minimal enough to provide clarity, but not so much that it requires the user to guess? Is the user required to complete the same task is multiple locations? Does the user know how to get help and answers quickly to complete a task? Does the user have to guess? Can they start/stop a process easily? See their progress?

SSP Redesign Principles based on the heuristic evaluation:

Designing the Right Thing & Right Time and Flow Awareness

- **Right Thing & Right Time:** The right information, and the right amount of information, should be show at the right time. Give the user enough information to make a decision and allow them to learn more. This also applies features. Display what's available to the user, but what is applicable to the task. Do not show all available options to the user at once. What amount of information does a user need to complete a task at a minimum? What amount of information would be too much? (Too much means that it undermines the clarity focus area.)
- **Flow Awareness:** Help the user to understand where they are, what they've done, and what they need to do to achieve the task/goal. Additionally, help them to feel confident about entering and exiting processes at any time.



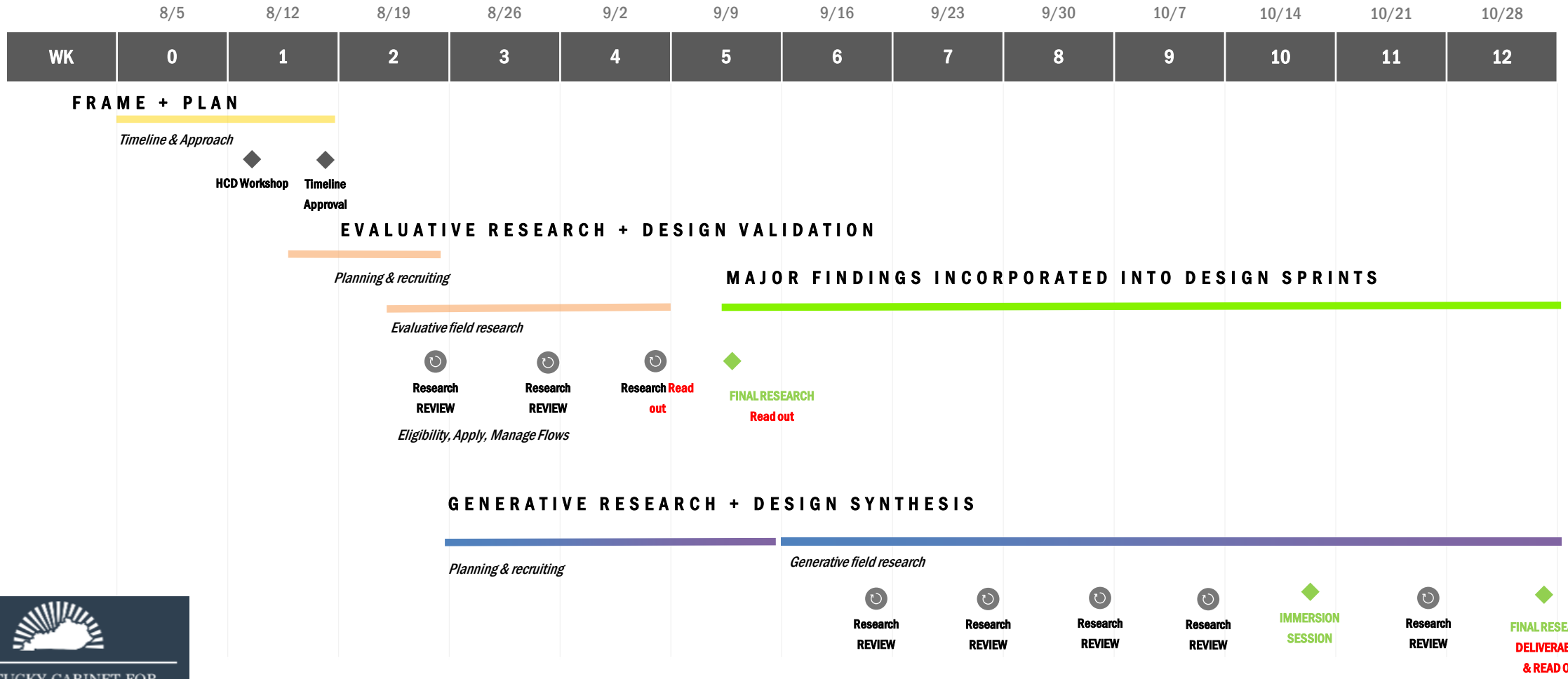
Timeline

Progress Review Cycle

Milestone/Deliverable

Research Timeline

Through an iterative design approach, we will explore ideas and concepts in the field, synthesize learnings, refine design, and validate refinements in the following research sprints.



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* Each research review meeting will serve to **align teams** on **preliminary findings** in the field and help to inform **design concepts**. Research review meetings are intended to review our progress **as it evolves**, and not final findings. ** Dates are contingent on client scheduling and timing*



Adoption Improvements

Historical access to KHBE and current kynect site

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	Unique Average Visitors Per Month
Old .Net benefind	39,808
New kynect benefits	137,895

Increase in unique visitors: 246%

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Call Services - Impact Across kynect modules

Call Reason Category	After Go-Live (10/1/2020 to 5/31/2021)/average per month	Pre-Go-Live (10/2/2019 to 09/30/2021)/average per month	% Change
Application Request	99	218	-54%
Application Status	1,481	4,094	-63%
Application/Enrollment *	3,368	2,635	+27%
Report A Change	2,323	2,635	-11%
Status of Application	2,342	4,616	-49%

** Increase is attributed to two (2) open enrollment periods since kynect go-live*

Usage Statistics Daily Averages

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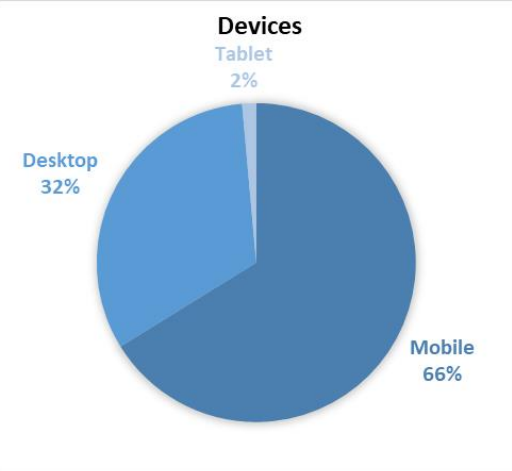
Total Count from Go-live (10/5/2020)

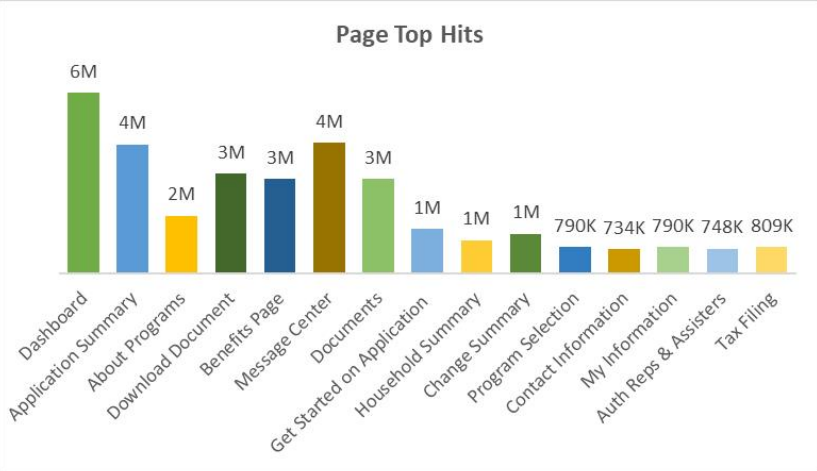
Total Visitors
3,485,219

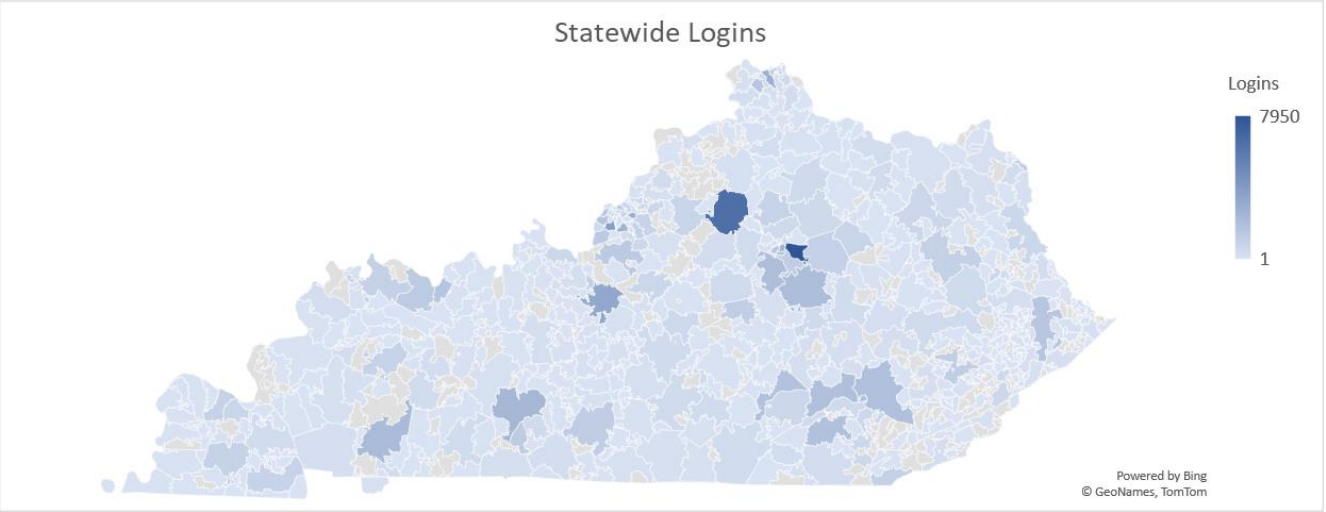
Total Logins
5,101,677

Avg. Page Views/Visit
8

Total Page Views
57,823,911







Impactful Results

- 3,485,219 users visited kynect benefits post go-live
- Over 5,101,677 logins into kynect benefits
- 66% of users came in through mobile
- 112% increase RACs from kynect benefits in the reporting period in comparison to the benefind daily average in 2020
- 144% increase Document Uploads from kynect benefits in comparison to the benefind daily average in 2020

Note: Underlying Google Analytics report used to pull numbers was updated to use URL instead of page header, as a result numbers may vary from previous reports