

First Class User Experience Design for Affordable Care Act Enrollment

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Enrollment UX 2014

Overview

1. Why focus on user experience (UX)
2. Partners
3. Design process and deliverables
4. Q & A

Why Focus on UX

- ACA requirements & CMS guidance for Exchange, Medicaid, CHIP, BHP
- Enrollment Workgroup recommended standards, protocols and guidance
- Public testimony of IT vendors in this space
- NASHP “gap” analysis
- Human-centered design thinking matters...

* Paving an Enrollment Superhighway: Bridging State Gaps Between 2014 and Today, March 2011

UX Project Objective

Support best-in-class user experience to help ensure that large numbers of eligible consumers successfully enroll in and retain coverage

“User Experience Design can positively impact the overall experience a person has with a particular interactive system.”

Wikipedia



We Live in a Digital Society



Enrollment Will Largely Be Online



Customer Service Expectations & Accountability



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Public-Private Partnership



Robert Wood Johnson Foundation



CALIFORNIA
HEALTHCARE
FOUNDATION

The
ATLANTIC
Philanthropies

blue shield
of california
foundation



KAISER PERMANENTE®



The Colorado
Health Foundation™



NYS
HEALTH
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UX Design Partner

IDEO



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IDEO

SOCIAL SECURITY ONLINE PROGRAMS SERVICES

Official Website of the Social Security Administration

Home » Programs » Retirement

Retirement

Deciding when to apply for and start claiming retirement benefits is a personal decision.

Understand Your Options

Many factors can affect your decision. First and foremost, people are working and living longer than previous generations. These trends are changing when and why people file for benefits. We'll outline the options so you can make the best decision for you.

Apply In 3 Easy Steps

We invite you to apply for benefits online, at your own pace. It's a convenient and secure 3-step process from start to finish — learn, plan and apply. We're here for you every step of the way.



Learn

Discover everything you need to know about Social Security retirement benefits.

LEARN NOW +

Plan

Use our planning tool to calculate rough estimates of how the decisions you make can affect your retirement benefits.

PLAN NOW +

Apply

Start the application process. When you're ready, we'll walk you through every step of the way.

APPLY NOW +

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Enrollment UX Design Process

Four design phases, over 26 weeks, with possible fifth phase TBD

Key design considerations:

- Centralization of design standards
- Re-use of key elements
- Broad distribution
- Usage at scale



Research – Phase 1

Understand needs of target users (6 weeks)

- Review Affordable Care Act requirements



- Conduct human factors research
- Assess mobile, smart phone and tablet platforms
- Review analogues

“Mobile Web” Survey

	2009	2010
Adult laptop and cell phone Internet (mobile Web) use	51%	59%
African-Americans active use of mobile web	57%	64%
African-Americans & English-speaking Latinos ownership of cell phones vs. whites (2010)	87% - 80%	

26 million tablets will be sold in 2011, with nearly 51 million sold in 2012. By 2014, there will be 71 million tablet users in the U.S. Forrester Research, January 2011

Source: Pew Internet and American Life Project, July 2010
<http://pewinternet.org>

CALIFORNIA HEALTHCARE FOUNDATION

Strategy – Phase 2

Translate / synthesize research (6 weeks)



- Develop design principles
- Behavior segmentation
- Initial design concepts
- Mobile recommendations
- 1-2 day strategy workshop

Example of Behavioral Segmentation

From Social Security Administration UX Project



PASSENGERS

EXPLORERS

PATHFINDERS

BY-PASSERS

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Example of Behavioral Segmentation

Hold my
hand
through
process

See all
possibilities

Show me
the
process

Get me
to the
finish



PASSENGERS



EXPLORERS



PATHFINDERS



BY-PASSERS

Initial Design - Phase 3

Define information architecture and develop user flows (7 weeks)



- Create wireframes to support various use cases
- Preliminary visual design direction
- Multiple user feedback sessions - test design concepts

Refine Design / Communications Plan – Phase 4

Documentation of visual and architectural
design (7 weeks)



- Working functional prototype
- Detailed design specifications and manual; channel integration
- Design elements and visual style guidelines
- Communication materials for sharing design

Code / Product Development – TBD

Develop programming resources to better integrate design elements into state-based systems (4-6 months)



- Explore use of template engine
- Offer no-cost perpetual software license



Questions & Answers