



## BENEFACTOR USER EXPERIENCE (UX) EVALUATION AND ROADMAP



### OVERVIEW

**Social Security Disability (SSD) programs provide critical benefits to 10.5 million disabled Americans and their families.** Applicants who qualify for benefits must first apply, but the application process is complex, confusing, and time consuming, particularly for a population facing significant barriers. Moreover, in Alaska, if an initial application is not approved, the chances of approval for an appeal are much lower. To address this concern, Alaska Legal Services Corporation (ALSC) created Benefactor, a new digital tool that helps guide case managers, social workers, and community navigators through the SSD application process to help them create high-quality applications for their clients that get approved the first time.

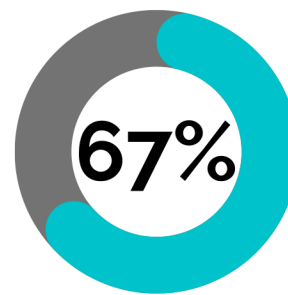
**In Fall 2022 and Spring 2023, UX4Justice collaborated with stakeholders and community members to conduct a user experience (UX) evaluation and discovery that identified opportunities for improving the UX of Benefactor, and built a human-centered roadmap for future product development, legal empowerment, and market growth.**



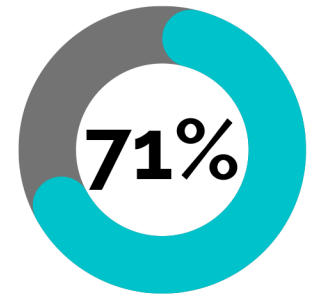
#### Research Questions

Can navigators use Benefactor to compile comprehensive applications and manage their case load? What new features and functions might navigators want to see in Benefactor to make the application and applicant management processes easier?

#### SSD Application Statistics



The average denial rate for initial SSD applications nationally hasn't changed for a decade.



Alaska's denial rate at the hearing level is well above the national average of 49%.



### OBJECTIVES

**1** Understand real users' pain points with the current application experience

**2** Discover common challenges and surface insights for solutions

**3** Design and test iterative solutions for immediate implementation

**4** Identify possible enhancements and innovations for future development



## PROCESS

1

### Interviews

Conducted two rounds of interviews with stakeholders involved in the SSD application process to understand pain points, needs and possible interventions.

2

### Usability Testing

Conducted moderated observation-based usability testing to identify pain points involved in completing a critical set of tasks using Benefactor.

3

### Ideation

Dynamic ideation resulted in hundreds of ideas, which were packaged into actionable solutions, and tested with the community to address potential assumptions.

4

### Prototype Design

Insights from several rounds of prototype testing drove the iterative design of an interactive prototype that better addressed navigator needs.

5

### Recommendations

Iterative testing resulted in data-driven recommendations for immediate redesign of core functionality. Additional features were mapped for later development phases.



## RECOMMENDATIONS

1

### NOW: INTUITIVE FUNCTIONALITY & FEATURE-RICH HELP

**Reduce cognitive load, anticipate questions, and increase confidence for users**

- Update file setup functionality to reflect a decision tree model that makes choices for customizing each applicant file more transparent and intuitive for navigators
- Make tracking and editing applications clearer with a step-by-step applicant checklist and a relocated and renamed "Back to Setup" button
- Use a "...See More" button for tooltips and "Get More Help" on the tooltip button that links to a new comprehensive Help section that lives in the toolbar
- Add descriptive headings, use familiar terms, and define legal terms when needed

2

### NEXT: ENHANCE BENEFACTOR WITH NEW TOOLS

**Integrate tools to address common challenges that are now handled outside Benefactor**

- Applicant profile dashboard to manage relevant case information from one place
- Calendar function to make scheduling, planning and deadline management easier
- A way to distinguish in-progress vs. closed applications on the applicant list
- Tool to auto-generate customized Medical Records Request packets for each applicant

3

### LATER: EXPLORE POSSIBLE FUTURE INNOVATIONS

**Conduct additional research into disruptive ideas to guide future decisions for development**

- Applicant-facing features to assist with collaboration and communication
- Public-facing version of Benefactor available for individual use
- Enterprise features such as gamification
- Virtual concierge / AI chatbot
- HIPPA compliance