

WaTech Washington State Resident Portal Roadmap



Executive Summary v1.1

Oct 15, 2024



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A Portal for Washington Residents



WaTech
Washington Technology Solutions



Enumclaw, WA
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VISION

Transform and personalize the way Washington residents engage with state government.

Resident Portal Goals and Objectives

Goal #1: Serve every WA resident

- Serve key resident segments
- Reflect the state population

Goal #2: Connect residents to all WA state government services

- Onboard agencies to the resident portal
- Make services available on the portal
- Increase use of digital channels
- Accurate AI-enabled recommendations

Goal #3: Improve residents' digital experience

- Make the portal user-friendly and responsive
- Provide high-quality service recommendations
- Build satisfaction

Goal #4: Maintain high levels of trust

- Ensure excellent portal performance
- Build trust

Goal #5: Increase awareness of Federal, local, and community services

- Increase awareness of Federal government services
- Increase awareness of local government services
- Increase awareness of community / non-profit services

Current Experience



Christmas Lighting Festival,
Leavenworth, WA



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Overview

Today, Washington residents face major challenges when trying to access government services. The system is fragmented, with confusing and inconsistent interfaces that make it hard to find and use the services they need.

Many people struggle with lengthy processes, such as filling out paperwork and dealing with multiple agencies that don't collaborate while serving an individual resident. These obstacles are especially difficult for those who need accessible and inclusive digital experiences, which are currently insufficient.

When residents are unable to self-serve, they are often forced to call or visit an in-person office, both of which represent higher-cost support channels for the state and create a more frustrating experience for residents.

TOP 5 RESIDENT PAIN POINTS

The top five reported pain points reported by Washington State Residents when engaging with government services today:

1. Customer service and communication issues (19%)
2. Dissatisfaction with a service or benefit (15%)
3. Information, clarity, and availability (14%)
4. Wait times (11%)
5. Difficulty with website functionality or gaps (9%)

CONSIDERATIONS WHEN "GOING DIGITAL"

Surveys and interviews indicate that regardless of whether their opinion about "going digital," residents share similar concerns about where and how their data will be used. This highlights opportunities for the Resident Portal to:

- Ensure the security of resident data
- Put controls in place to restrict data sharing, protect resident privacy, and prevent mis-use of data that could lead to discrimination.

Secure Access Washington (SAW)

Washington state's current resident experience intertwines with the soon-to-be deprecated single sign-on (SSO) solution: Secure Access Washington

Replacement of SAW is split between two WaTech initiatives:

- The Identity Access Management initiative will replace SAW's SSO capabilities
- SAW's existing capabilities will be folded into the new WA Resident Portal.



Good afternoon!

What can we help you access today?

[ACCOUNT](#)[GET HELP](#)[Español](#)[LOGOUT](#)

Welcome to Secure Access Washington! To start using services from agencies around Washington, choose one from your list below or click the 'Add A New Service' button. [To see open job postings for the SAW Team, go to our jobs page.](#)

[Add A New Service](#)

DOL License express website provided by Department of Licensing

[Access Now](#)

Department of Licensing: to view/manage my driver, vehicle, and boat licenses.

[Contact the help desk for lx](#) [Remove from my list](#)

Unemployment eServices - for individuals provided by Employment Security Department

[Access Now](#)

Manage your current and past unemployment claims. Apply for unemployment benefits, submit weekly claims, file appeals and more.

[Contact the help desk for BCS](#) [Remove from my list](#)

Behavioral Health Reporting System provided by Health Care Authority

[Access Now](#)

Behavioral Health Reporting System

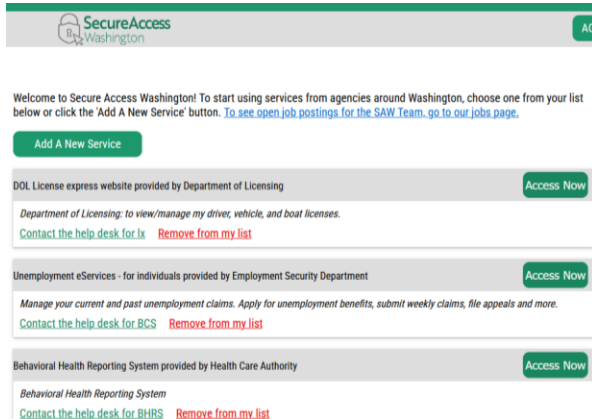
[Contact the help desk for BHRS](#) [Remove from my list](#)

Services From

ALL OF WASHINGTON

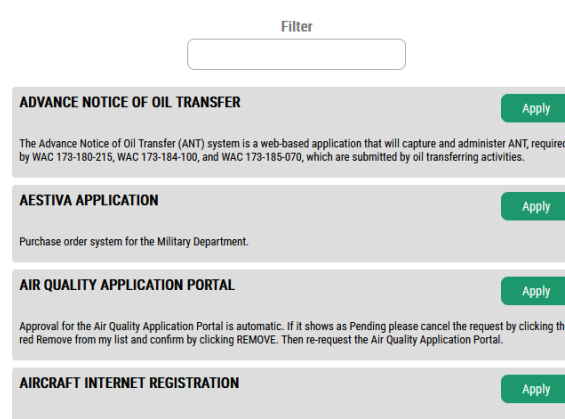


SAW Capabilities Moving into Resident Portal



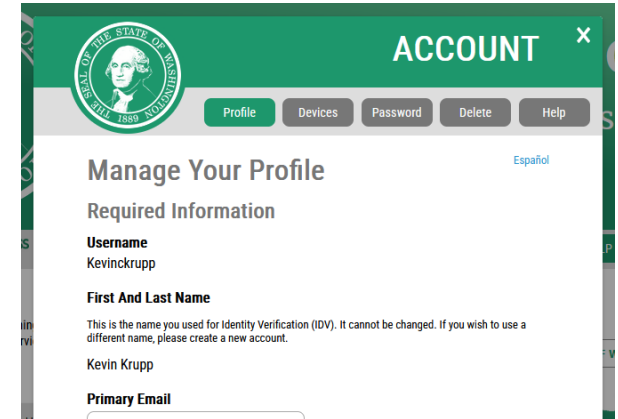
1. Saved Services

A resident-curated list of bookmarks that link from SAW to services a resident regularly uses, allowing that resident to quickly jump to the respective agency service after logging into SAW. This list is manually managed and maintained by the resident.



2. Service Finder

Residents can browse a list of all available state agency services, many of which can be saved to the resident's saved services. Residents can search for a service by name, by agency, or by using a code provided by agency staff.



3. SAW Profile

A simple profile for the user's account. It tracks the user's First and Last Name, email address, and phone number for MFA purposes. No further data about the user is centralized within SAW; all other data about a resident is managed individually by each agency.

Market Research



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Columbia River Gorge, WA

Market Research

We evaluated the portal experience of 30 entities:

- 2 countries
- 18 states
- 3 counties
- 2 cities
- 5 private entities



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Gold
Microsoft
Partner
Microsoft

BlueCross
BlueShield

United
Healthcare

snowflake
SERVICES
PARTNER
SELECT

**BEST
BUY**

Case Study: Ohio

A DE-CENTRALIZED "APP STORE"

Portal name: OHID

Link: <https://ohid.ohio.gov/wps/portal/gov/ohid/home>

User base: Grew to 7M over ~3-year time frame. Currently 30-50K/month

Architecture & Administrative approach: De-Centralized

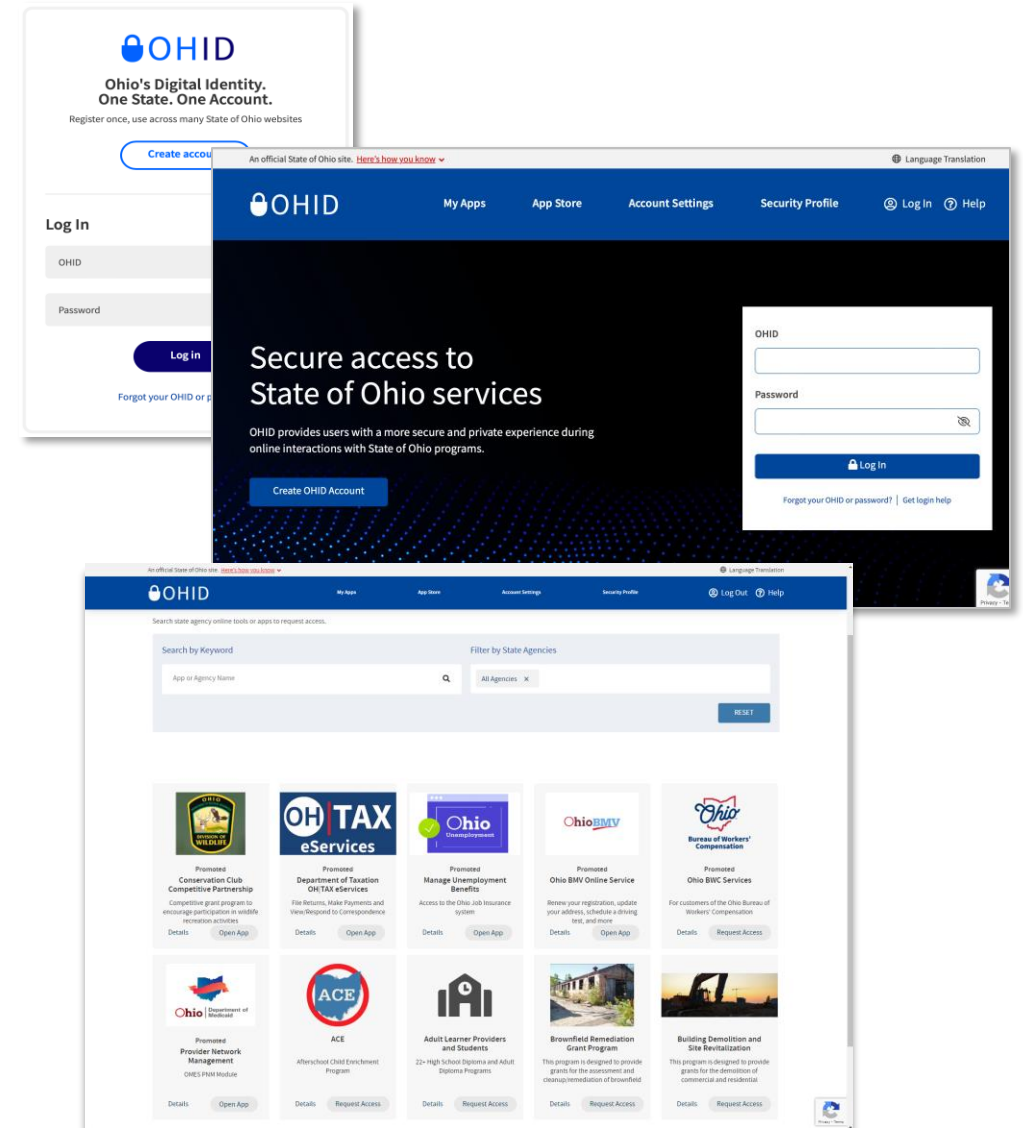
- A single resident-facing voice for Ohio that is managed centrally.
- Single digital identity - OHID - used for platform and agency website logins
- Enterprise services provided for other agencies to consume - see <https://innovateohio.gov/platform>.
- "App Store" paradigm, with Apps focusing on one or more specific service or process, rather than on an Agency. This seems easy for residents to understand.
- For apps with <50K users, each agency builds their own apps and uses self-service tools to integrate.
- For apps with >50K users, agencies need to engage a managed services vendor.

Technologies used

- Currently on HCL, on-prem (migrating to cloud-based CMS - Contentful)
- Socrate identity service

Pain Points

- Biggest resident pains include the IAM and MFA, search / finding services, and getting support.
- Biggest issue on admin side is platform stability - both HCL and the identity service provider (IBM).
- Fraud management has become a significant area of focus.
- Providing resident support: Currently larger apps have their own help desks on a centralized ServiceNow ITSM tool.



Case Study: South Dakota

CENTRALIZED ON SERVICENOW

Portal name: mySD

Link: <https://www.sd.gov/cs>

User base: ~700K accounts

Architecture & Administrative approach: Centralized

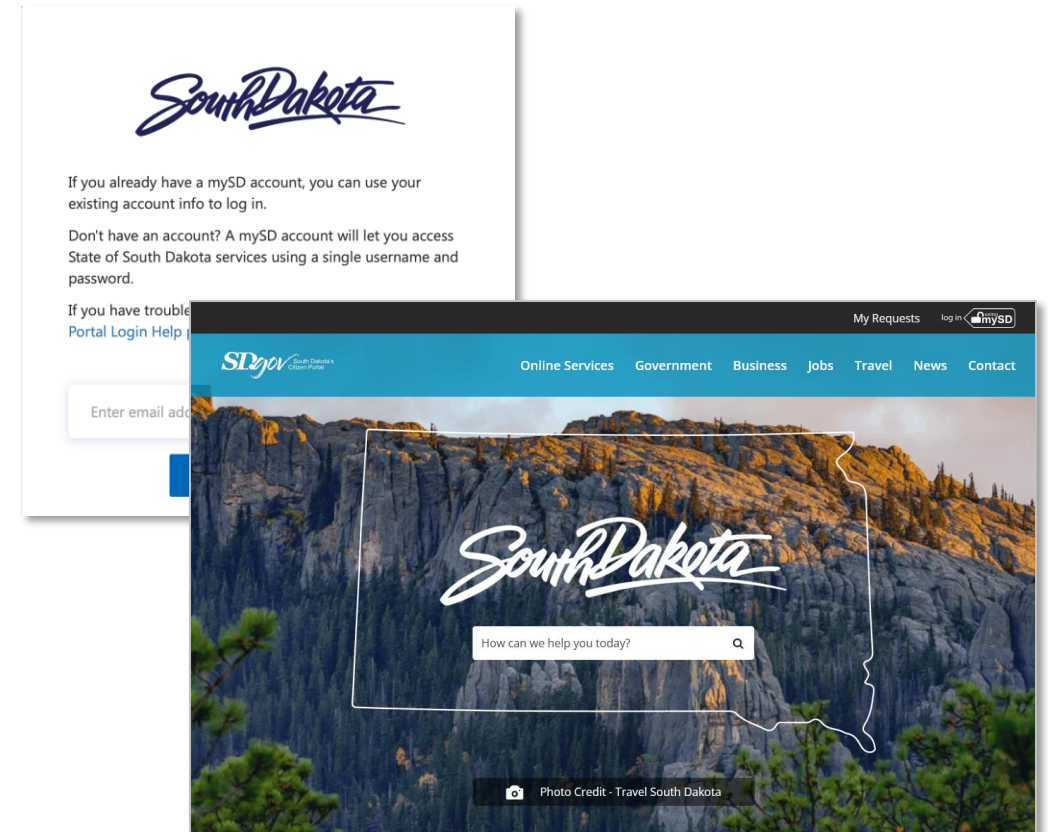
- Centralized ServiceNow solution administered by the SD Bureau of Information & Telecommunications (BIT).
- Administrative focus is on building agency workflows directly in ServiceNow.

Technologies used

- ServiceNow, including the Public Sector Digital Services module
- Single sign-on technology

Pain Points

- Customizing ServiceNow is difficult and expensive.
- Custom features built by SD at their (BIT's) cost were later re-sold as features to new ServiceNow customers.
- Initial accelerated build should have included internal staff.
- ServiceNow's configuration experience is not intuitive or easy to use.
- SD's ServiceNow is not fully integrated to existing agency back-end systems and cannot be trusted as the system of record.
- ServiceNow provides some workflows out of the box, but most of SD's workflows are custom-configured for each individual service.

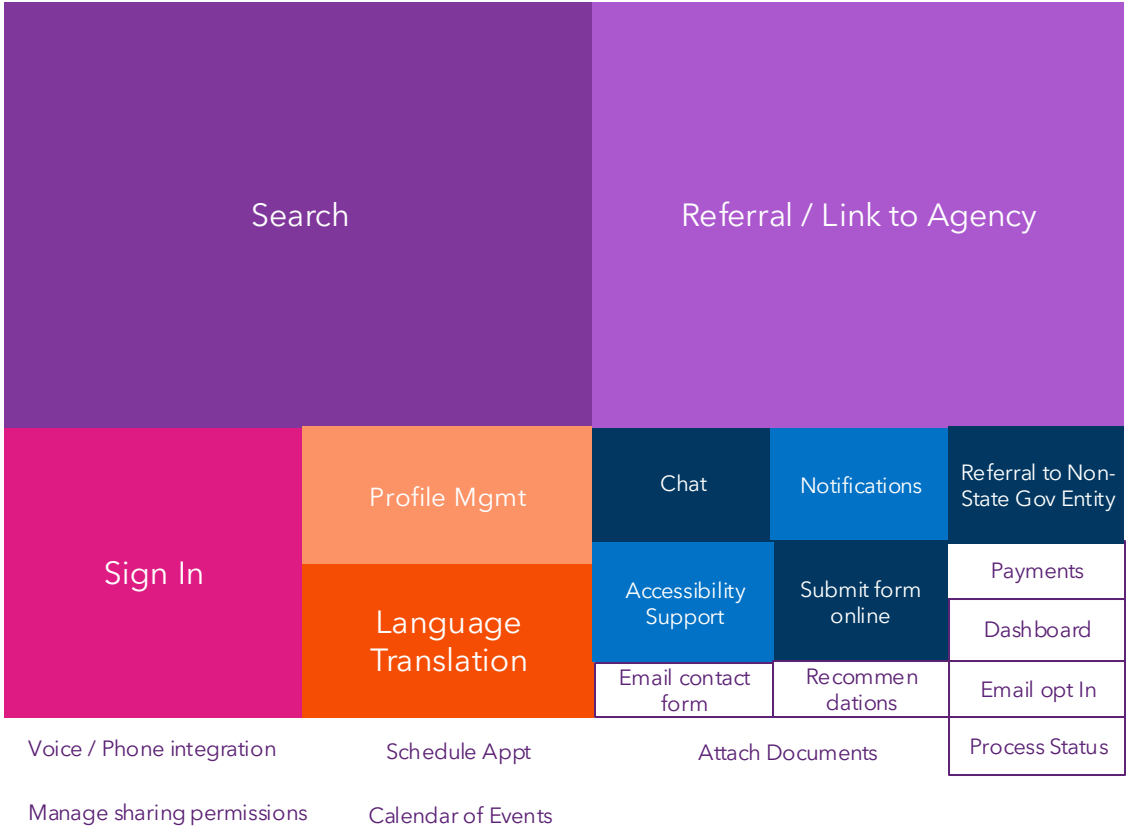


A True Portal Experience is Rare

Of the 18 state experiences evaluated:

- 1/2 don't have a unified login experience
- 2/3 don't have support for profile management and language translation
- 3/4 don't have chat, notifications, or online forms within their portal
- Centralized payment processing, a user dashboard, and recommended services were each only found at 1 state.
- Most common capability: Search with links to the respective agency website.

EVALUATED CAPABILITIES: 18 STATE "PORTAL" SITES



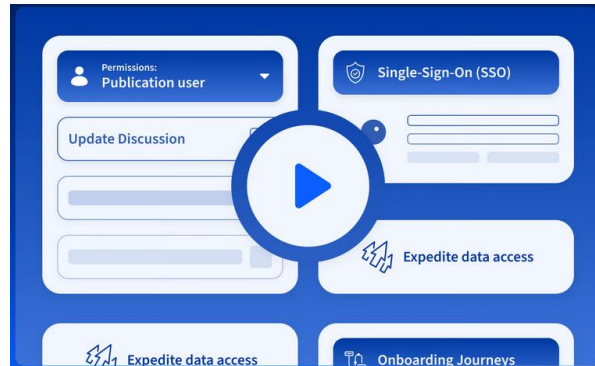
Key:

Purple 12 +
 Pink 7-9
 Orange 5-8
 Blue 3-4
 Hollow 1 -2

text only = not present

Digital Experience Platforms

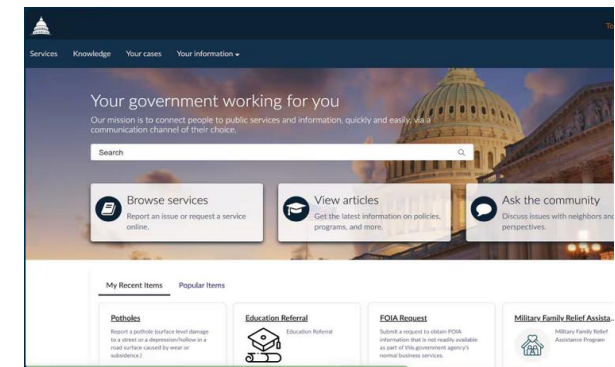
We evaluated various digital experience platforms, and further research is needed to finalize the recommendation.



- Liferay uses native and ReactJS widgets to accelerate the development of reusable components that align with the desired Resident Portal's capabilities and enhance user experience.
- Additional research is needed on its back-office, role management, react integration, and AI integration features.



- Jahia is a highly customizable content management system that fully leverages ReactJS, enabling the integration of reusable React components into templated layouts.
- Additional research is needed on its back-office, role management, react integrations, and AI integration capabilities.



- As a growing leader in the digital public sector, ServiceNow is increasingly chosen by multiple states to build digital resident experiences.
- Although it offers less customization for resident-facing features, ServiceNow provides a wide range of out-of-the-box features and robust back-office capabilities.

Market Research: Top 10 Lessons Learned

❑ **Prioritize Fraud Prevention**

- Implement strong fraud management systems with effective identity proofing to protect residents.

❑ **Collaboration with Agencies is Critical**

- Effective collaboration and change management across agencies are vital for successful implementation.

❑ **User-Centric Design and Organization**

- Structure information according to resident actions rather than by agency (e.g., group license applications/renewals together)

❑ **Innovate with Industry Standards**

- There's no single off-the-shelf solution. But we can still innovate while leveraging industry standard technology to minimize customization.

❑ **Easy Wins**

- Explore easy wins using portal designs that serve as link aggregators. (Tennessee's MyTN app combines integrated features with deep links to agency websites, providing a seamless navigation experience for residents).

❑ **Ensure Platform Stability**

- Platform stability is crucial for administrative operations. Ohio and South Dakota struggled with platform stability issues, particularly with HCL (for Ohio) and the identity service provider (IBM) in South Dakota.

❑ **Budget Constraints and Integration Challenges**

- Agencies often face issues with low budgets. Ohio and South Dakota encountered challenges related to budget limitations that impacted their implementation strategies.

❑ **Leverage Leadership Support**

- Strong involvement from state leadership is crucial. In Ohio, a governor's mandate ensured early engagement and resource availability, ultimately leading to a contract with Deloitte and additional resources over time.

❑ **User Experience and Feedback**

- Continuous user feedback should inform future enhancements to the portal, ensuring that changes align with residents' needs.

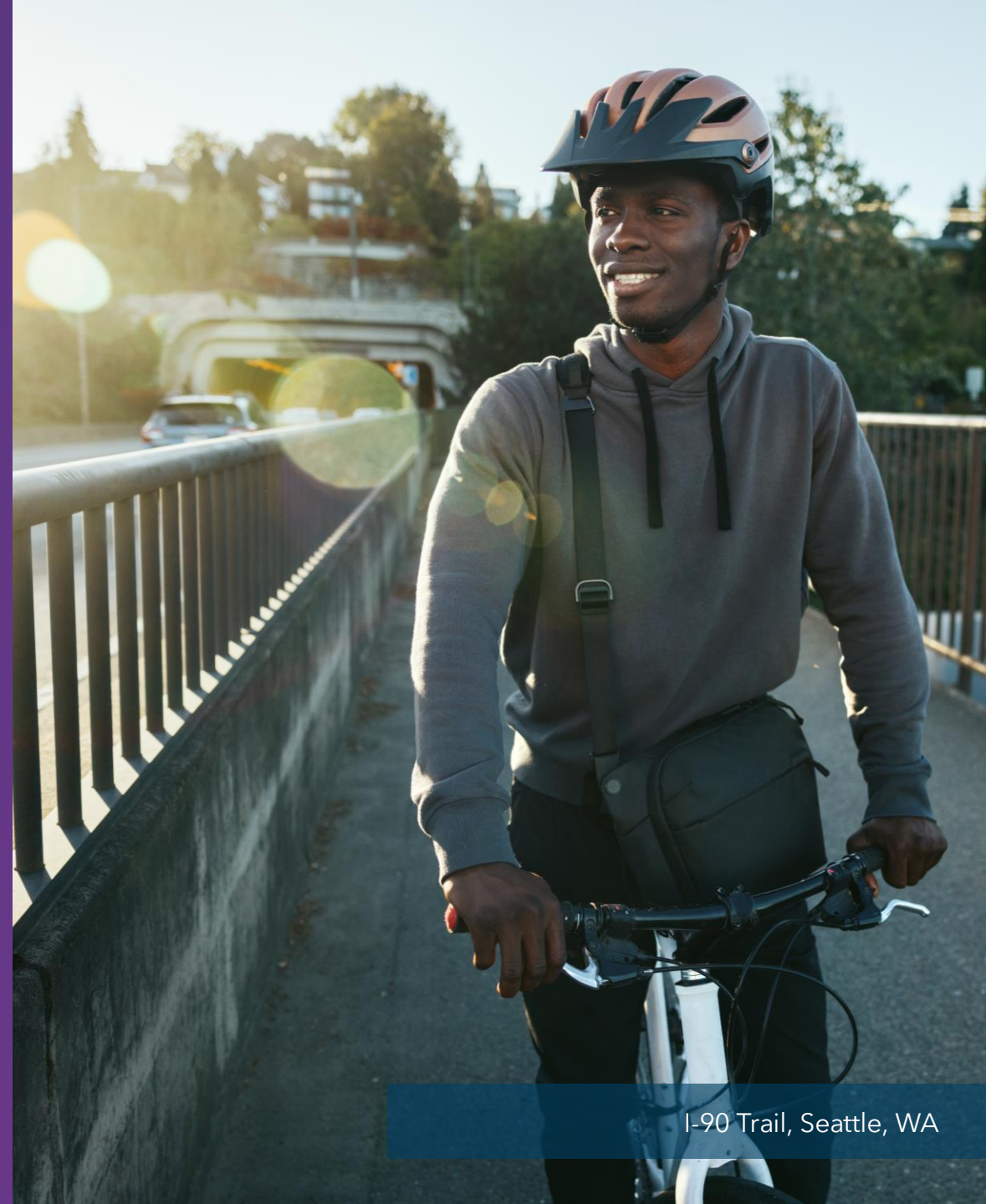
❑ **Improve Search and Navigation Features:**

- Invest in enhancing search functionality for easier access to services

Journey Maps



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I-90 Trail, Seattle, WA

Journey Maps

The journey maps are stories that illustrate the future experience of various resident personas when using the Resident Portal to address their needs.

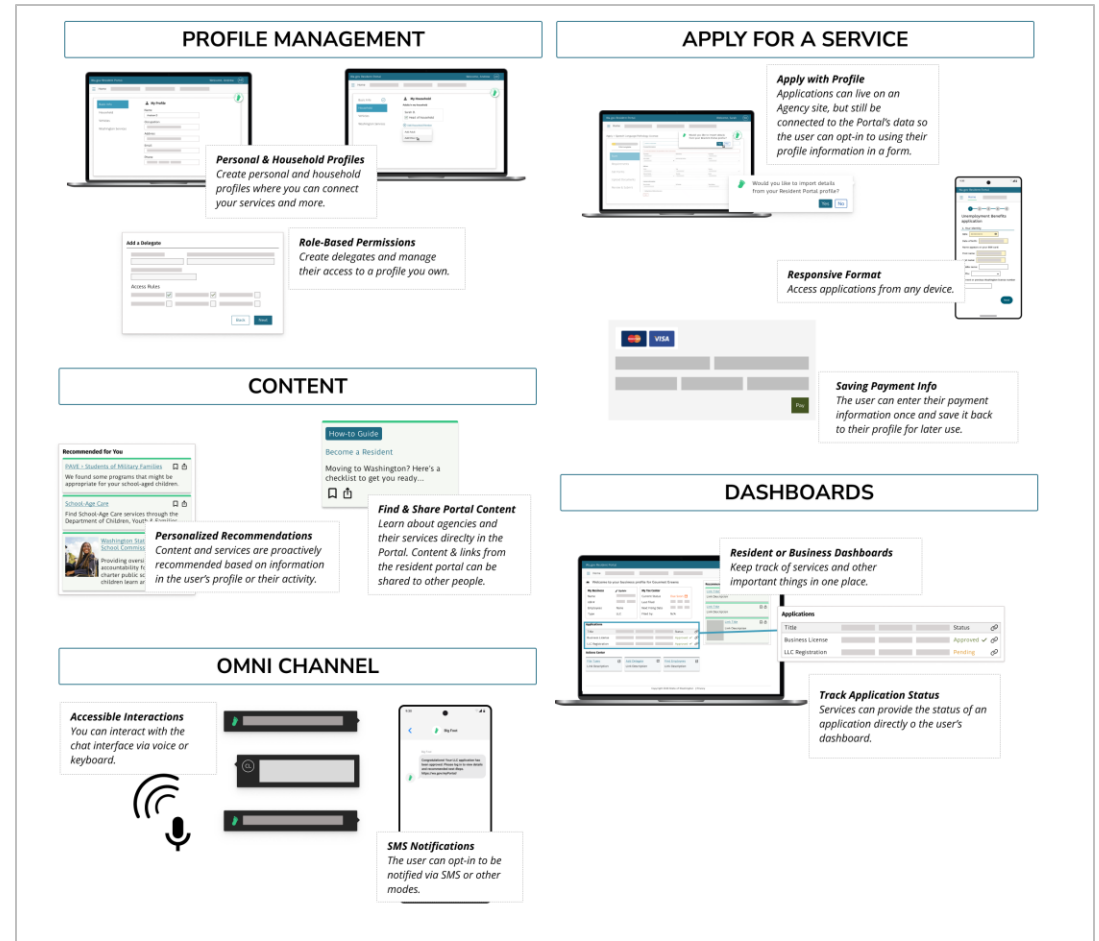
The stories showcase key portal capabilities and how they transform the resident experience of engaging with their government.

Journeys

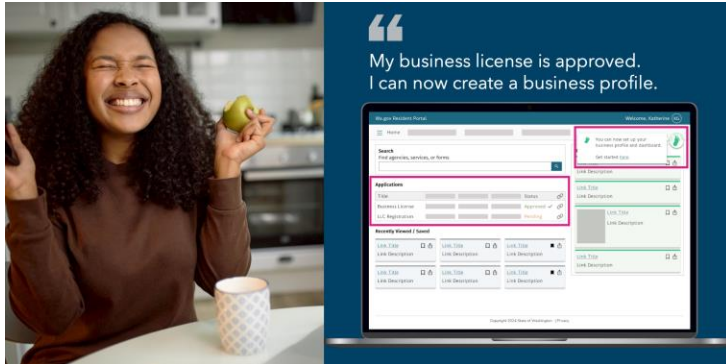
1. Katherine
2. Manuela
3. Andrew

* Please refer to the Appendix for additional detail about the personas we reference in these journeys.

Highlighted Capabilities



Katherine's Journey

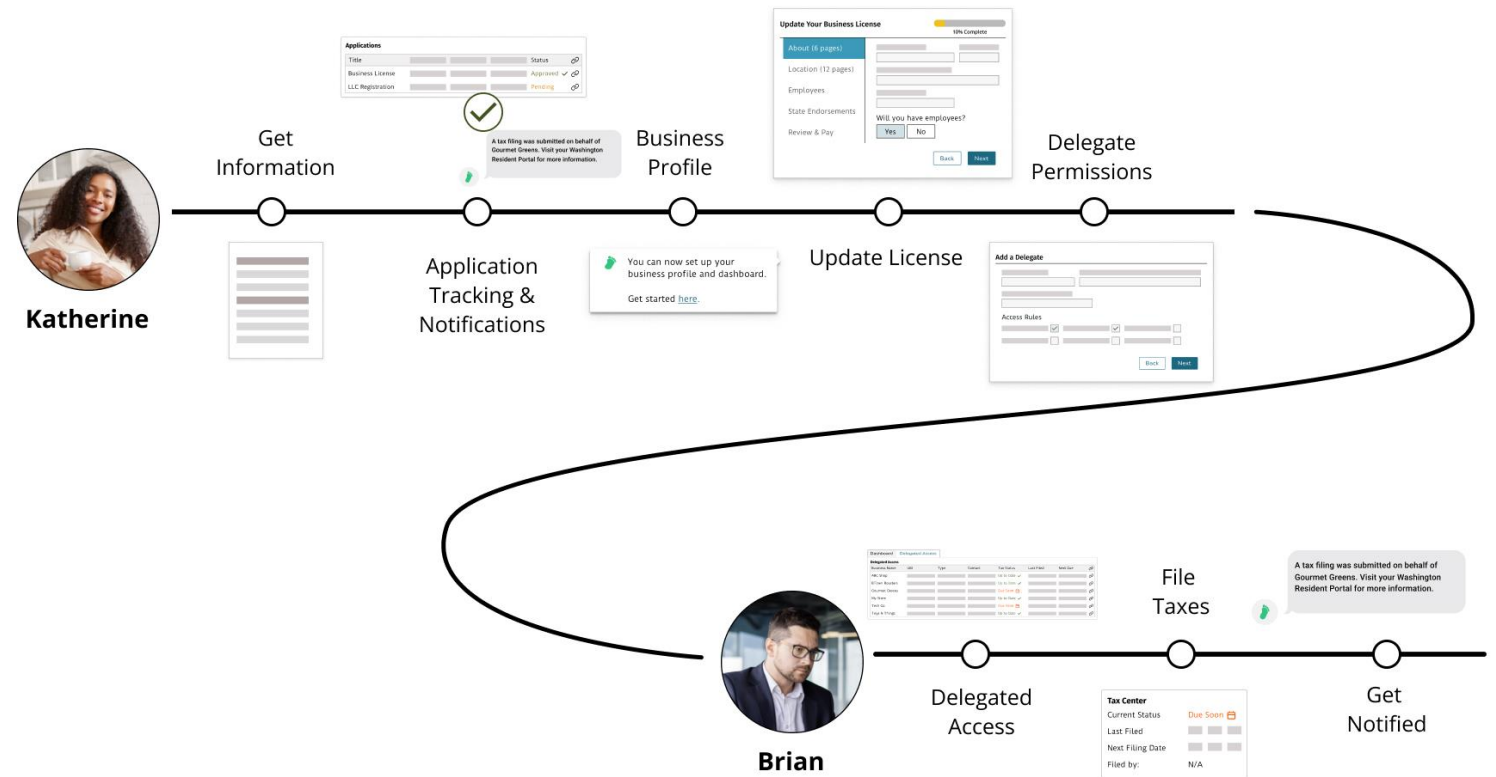


Katherine is a resident starting a new business in the State of Washington. Her journey highlights how the Washington State Resident Portal supports her and her accountant, Brian, throughout the process.

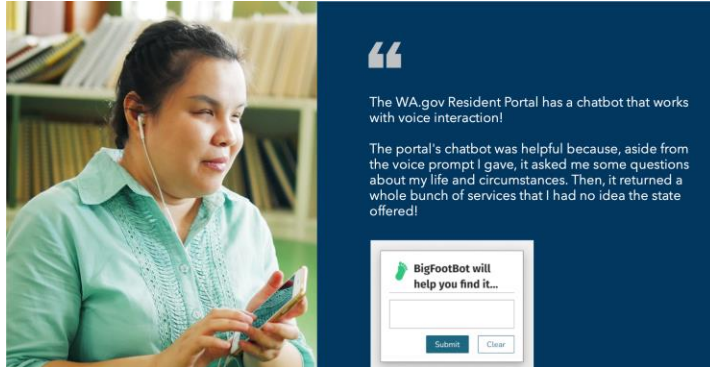
Katherine's journey illustrates two key user personas:

- Regulated Business and Professionals
- Professional Supporter

JOURNEY AT-A-GLANCE



Manuela's Journey



Manuela is a resident whose life was profoundly changed by an accident that resulted in the loss of her sight. Her journey highlights how the Washington State Resident Portal helped her regain confidence through the resources available in the State.

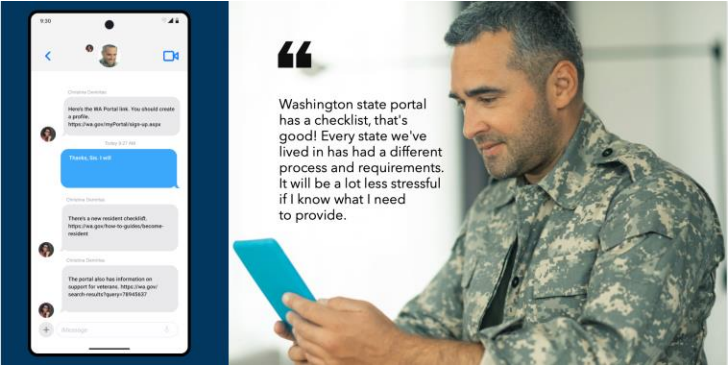
Manuela's journey illustrates two key user personas:

- Casual Until Concerned Resident
- Public Benefits Recipient

JOURNEY AT-A-GLANCE



Andrew's Journey

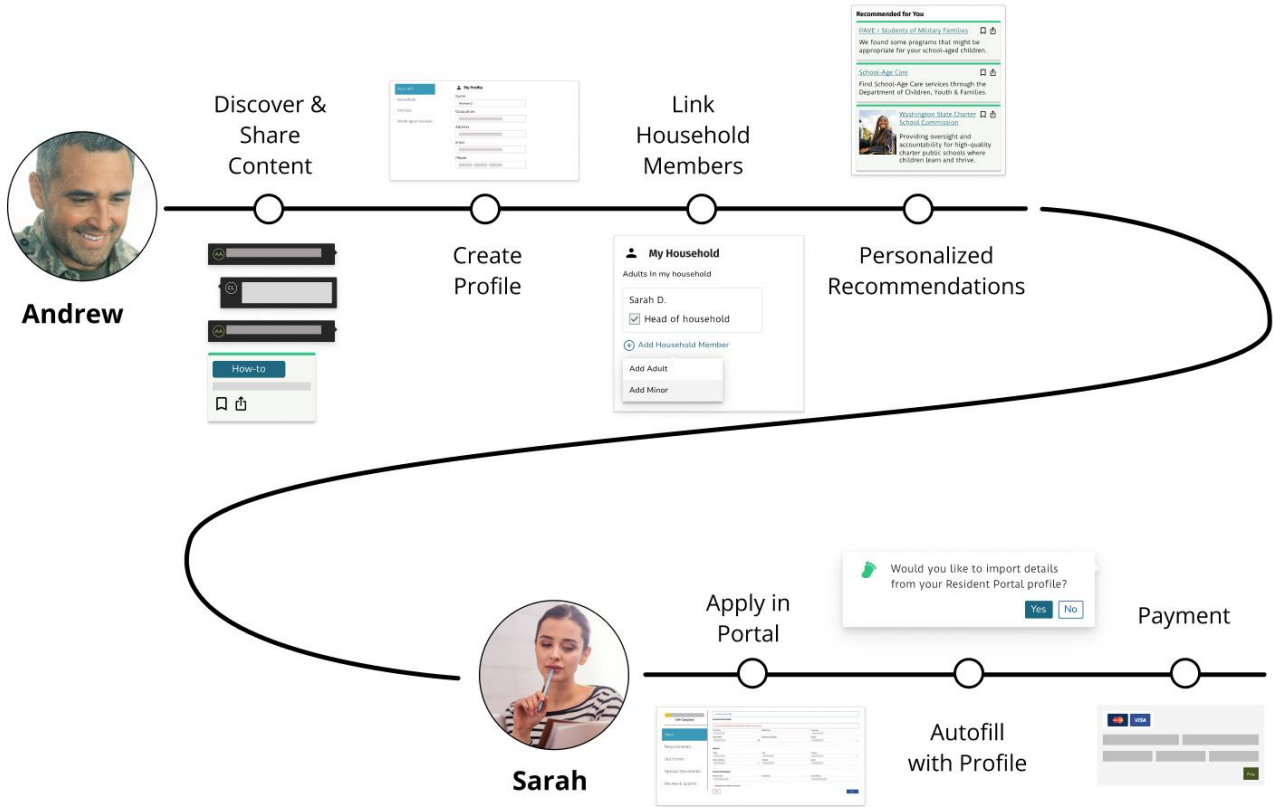


Andrew is a military "lifer" finishing his last term and settling in Washington with his wife, Sarah, and their school-aged daughter, Olivia. Their journey highlights how the Washington State Resident Portal has been instrumental in helping them access essential resources for new residents.

Andrew's journey illustrates two key user personas:

- Informal Supporter
- Casual Until Concerned Resident

JOURNEY AT-A-GLANCE



Unlocking the Resident Experience



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Capital High School, Olympia, WA

A Modern Tech Stack

The Technical and Architecture Requirements documentation describes how to enable the key elements of the new Resident Portal experience. These key elements are central to achieving the goals and vision outlined in this engagement.



Personalization

Creating a unique experience tailored to each resident through the use of AI recommendations, the ability to customize areas of the portal and more.



Artificial Intelligence: Big Foot Bot

Re-imagined ways of interacting with the portal through a chat bot would allow residents to easily find what they need and even fill out applications.



Agency Service Integration Tiers

Allowing residents to access services directly will enable advanced capabilities like applying with Big Foot Bot. At other levels of integration, the user will be able to access some shared features and get status updates from services they have applied to.



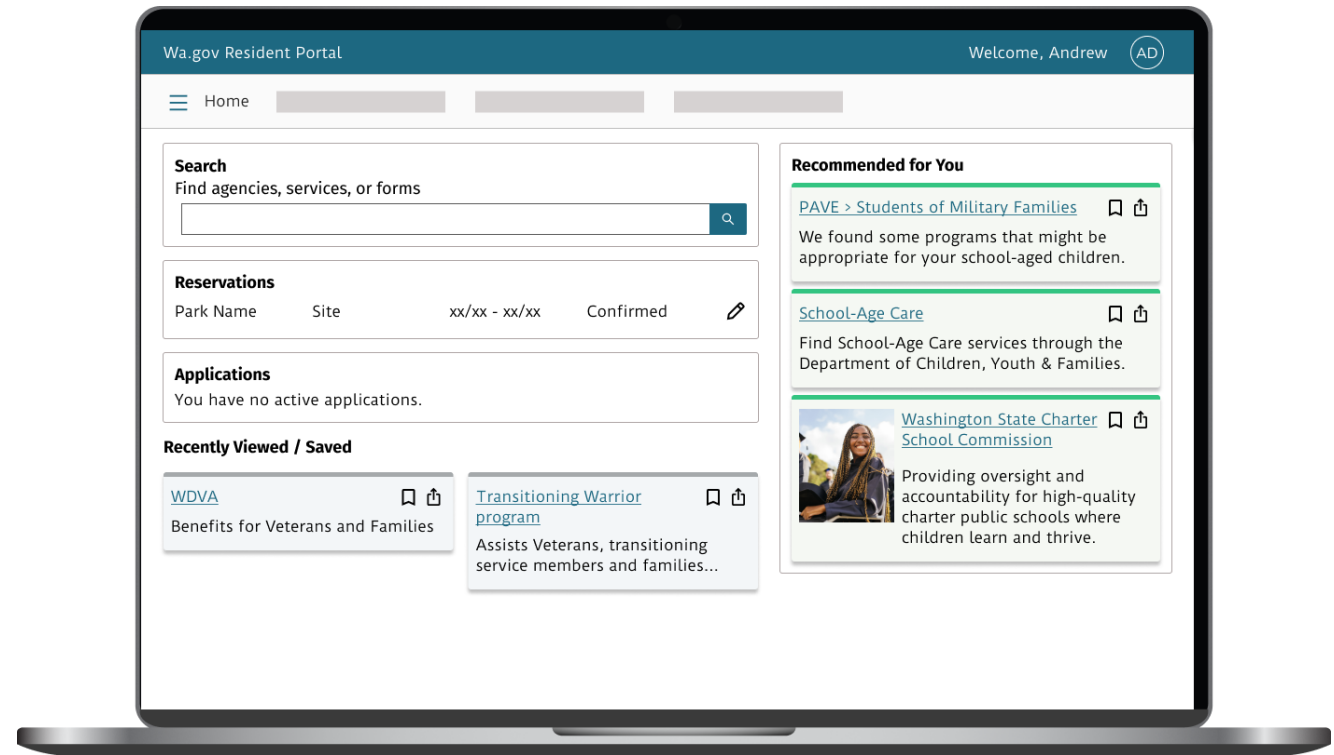
Data Privacy & Security

Give residents control of their data to build trust while allowing data to flow seamlessly as they interact with various agencies.

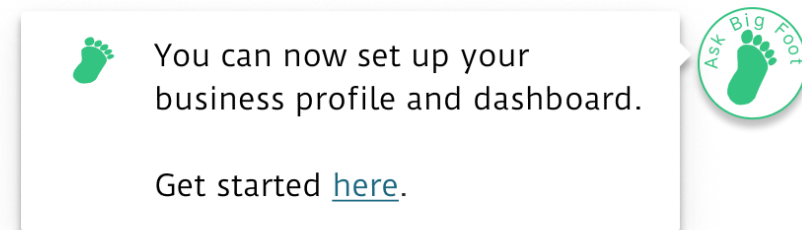
Personalization

The Resident Portal offers various forms of personalization to enhance user experience and engagement. Some of the key personalization features include:

- 1. Recommended Content and Services:** The system highlights relevant content and services based on user data and interest
- 2. Personalized task list and prompts:** Automatically generates a tailored list of tasks for users to reference, aligned with their applied-for and active services.
- 3. Permissions/preference-based dashboards:** The system adjusts the content of the My Services Dashboard based on user preferences, permissions (e.g., Profile owner, Delegated user) and the type of Profile (e.g., personal, professional)



E.g.: Dashboard of a resident highlighting recommended content and services



E.g.: Personalized prompts to help user navigate the next steps in establishing their business

Artificial Intelligence: Big Foot Bot

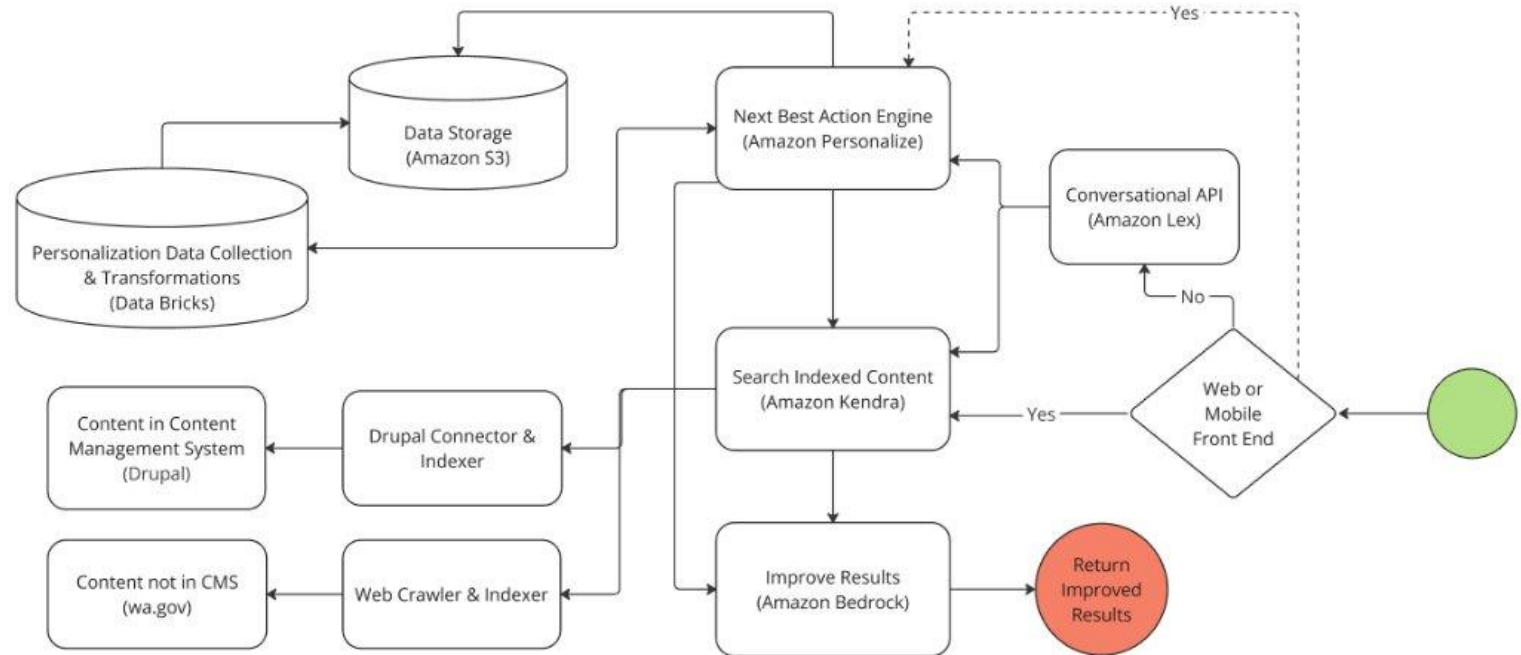
Big Foot Bot is the face of the services that leverage AI to provide the residents an unrivaled experience

What is Big Foot Bot?

- Artificial Intelligence incorporated into the platform to improve the user experience.
- This includes a conversational experience that a user can engage with any time they are in the portal.

What can it do?

- **Determine the "next best action":** Recommend the most relevant or optimal action for a user
- **Enhance search results:** Providing more accurate and relevant results by understanding the user's context.
- **Make personalized recommendations:** Analyze user data to recommend services or content that match the user's preferences
- **Have conversations with residents:** Enable residents to interact with chatbots and voice assistants to access information, make appointments, apply for services, or complete transactions through natural language.



Big Foot Bot - Example

USE CASE

Big Foot Bot automates the campsite reservation process

FUNCTIONALITY:

- Big Foot Bot conducts a search within an integrated campground reservation service.
- Fills out the reservation form using the resident's profile data, ensuring a quick and seamless booking experience.



What can I help you with, Andrew?



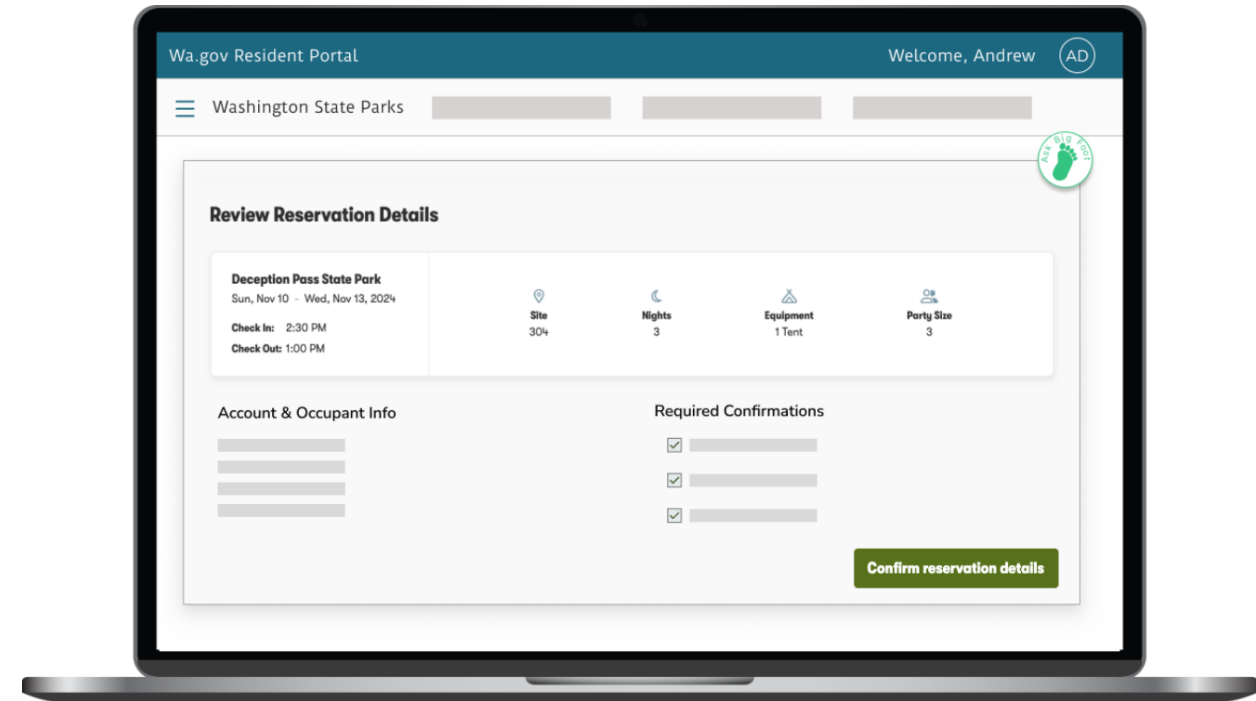
Can you book a campsite at Deception State Park for November 10-13?



Yes, site 304 is available on those dates. Would you like me to fill out the reservation request using your profile?



Yes, please do!



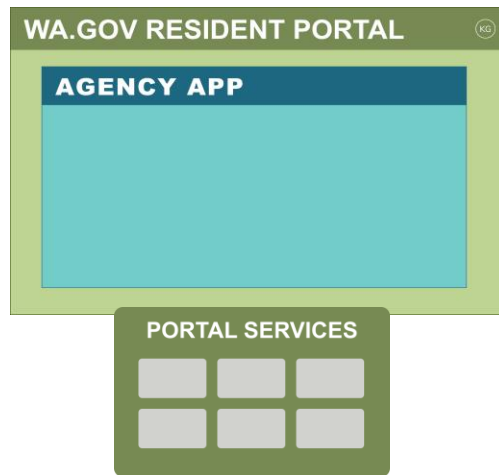
Agency Service Integration Tiers

The integration levels refer to how a specific service is provided by the agency. Since agencies offer various services, each one can have a different level of integration and can be added to the portal at different times.



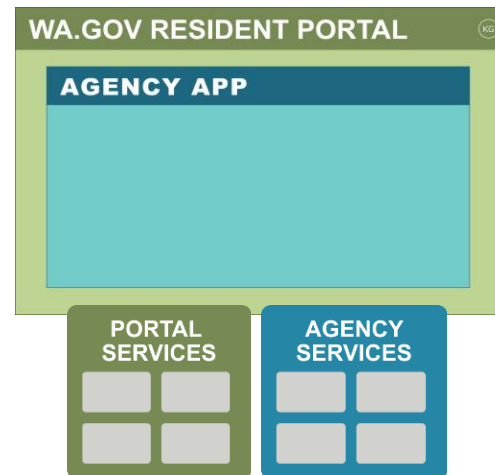
TIER 1: Fully Integrated

Agency service built into the Resident Portal from the ground up; full front-end and back-end integration.



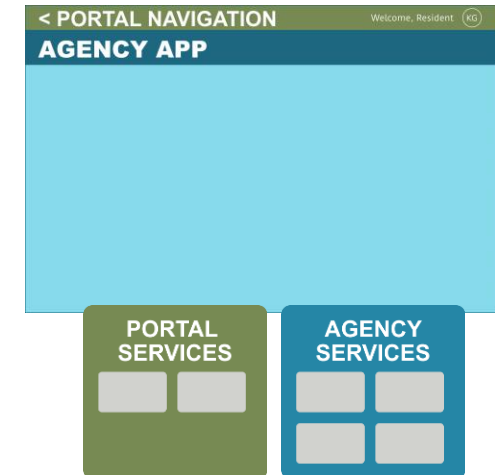
TIER 2: Agency Backend

Agency service with a new front end for the Resident Portal; backend utilizes existing agency resources.



TIER 3: Hybrid

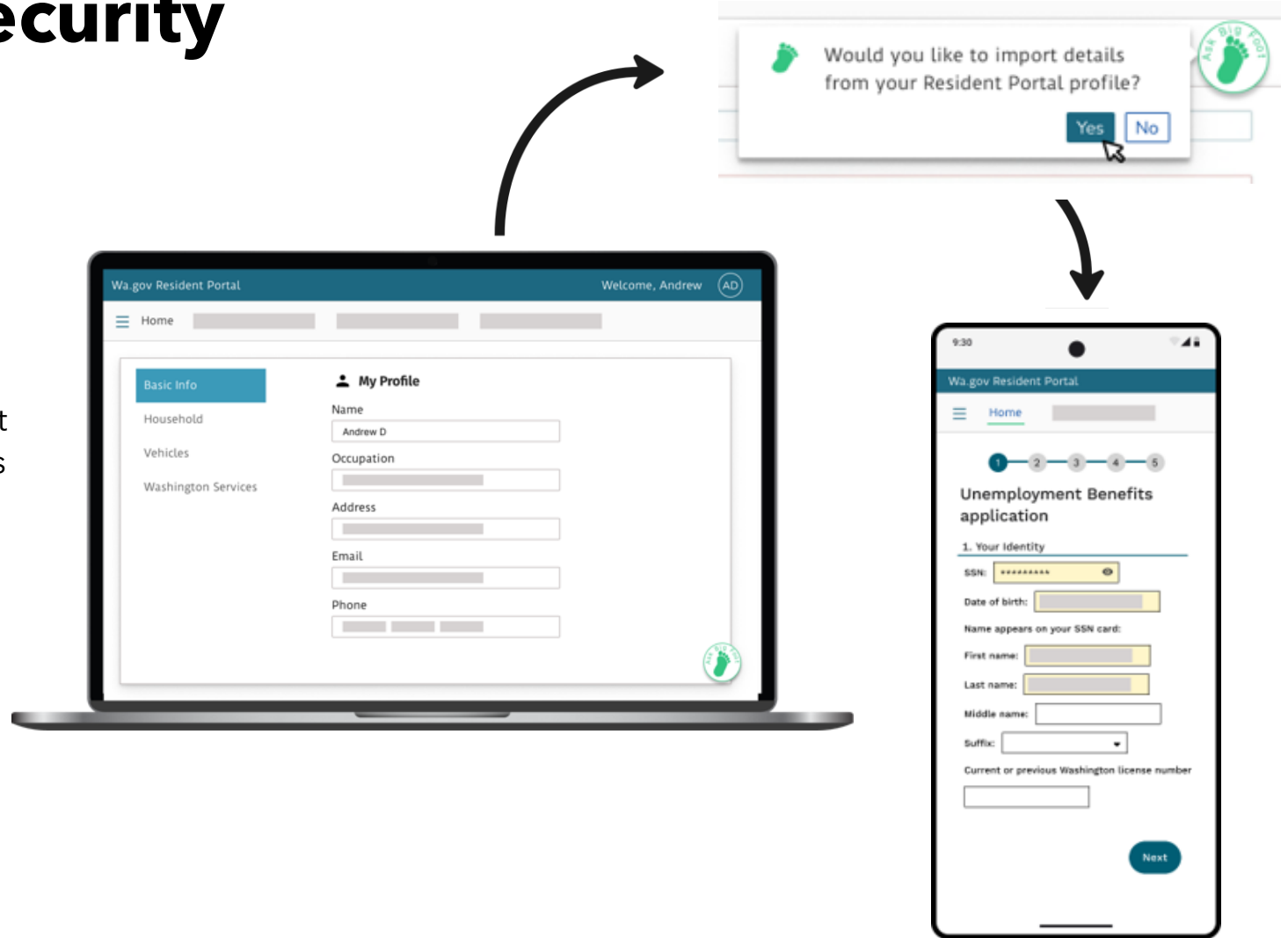
Hybrid agency service using Resident Portal resources for some shared experiences. Resident Portal directs residents to the agency's site.



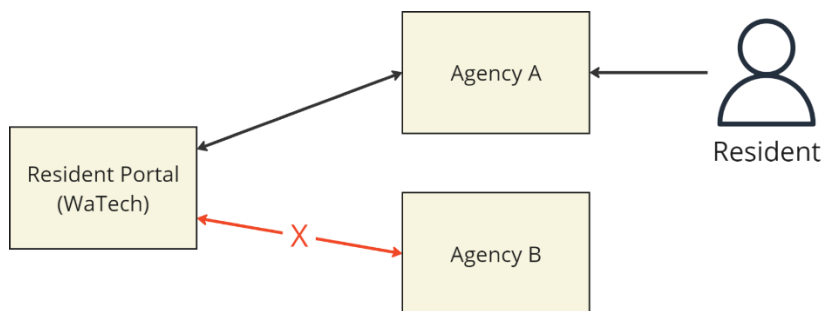
Data Privacy & Security

Consolidating commonly used data (e.g., addresses, phone numbers, emails) into a centralized **Resident Profile** simplifies data management across multiple State Agencies.

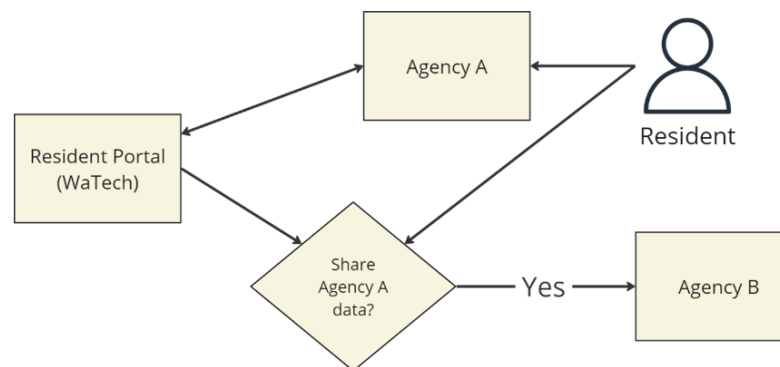
- Residents only need to update contact information or notification preferences once.
- Works with Identity Management (IDM) and Identity Verification (IDV) to eliminate repeated uploading of sensitive documentation.
- Puts the resident in control of which agencies and individuals have access to specific data.



Data Privacy & Security



Agencies Exchanging Data - Not Many to Many



Agencies Exchanging Data - Many to Many Via the Resident

Laws and policies limit data sharing

- Establishing a data sharing agreement between WaTech and each agency during onboarding allows the Resident Portal to obtain and display to the residents' data to them.
- This agreement does NOT allow WaTech to share the received data with other agencies.

Gaining Resident Consent Builds Trust

- Ensuring data collection and usage remains transparent to residents is critical to retaining resident trust in the Resident Portal and the State government.
- The Resident Portal must actively seek consent from residents before sharing their data.
- The Resident Portal should encourage, enable, and facilitate residents to manage their shared data effectively.

Recommendations Summary

User Interfaces

	User Interface Recommendations
Web & Mobile	React
Contact Center	Amazon Connect (Preselected by WaTech)
Campaign Engine	[TBD: Amazon Connect Twilio]
Digital Experience Platform	[TBD: Liferay Jahia Service Now]

Big Foot Bot | AI

	Amazon Centric AI Approach	Microsoft Centric AI Approach
Large Language Model (LLM)	Amazon Bedrock	Azure OpenAI (includes GPT-3/4 & Codex)
Next Best Action (NBA) Engine	Amazon Personalize	Azure Personalizer
Conversational API	Amazon Lex	Azure Bot Service with LUIS
Intelligent Search	Amazon Kendra	Azure Cognitive Search
Web Crawler	Amazon Kendra Web Crawler	BA Insight Website Crawler & Azure Cognitive Search
Drupal Connector & Indexer	Amazon Kendra Drupal Configuration	Raytion Drupal Connector & Azure Cognitive Search

Building a Roadmap

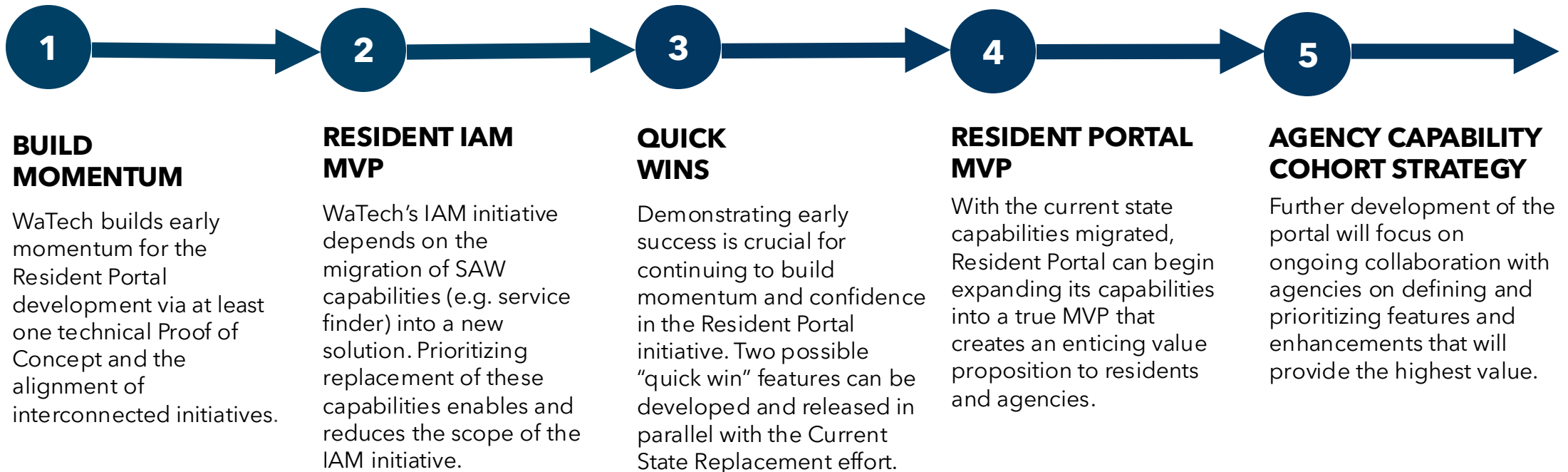


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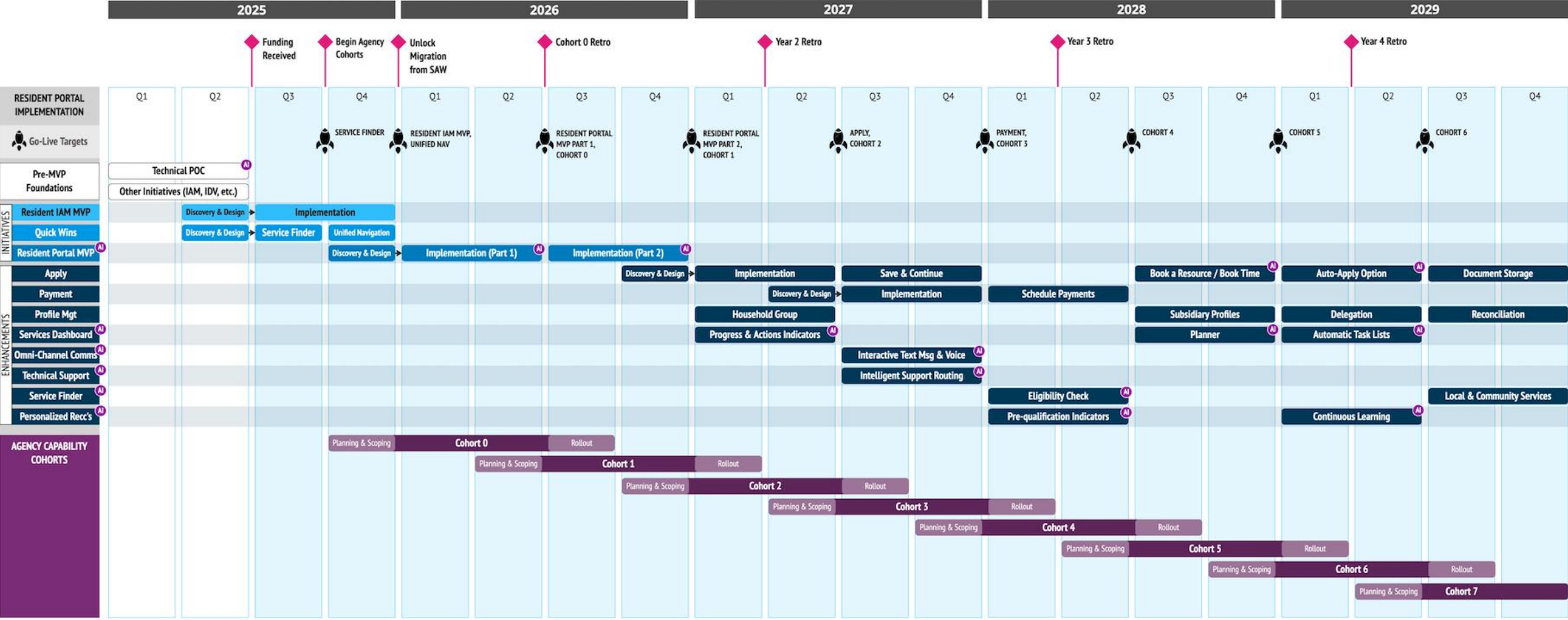


Colfax, WA

Resident Portal Implementation Strategy



Resident Portal Roadmap: High-Level Sequencing

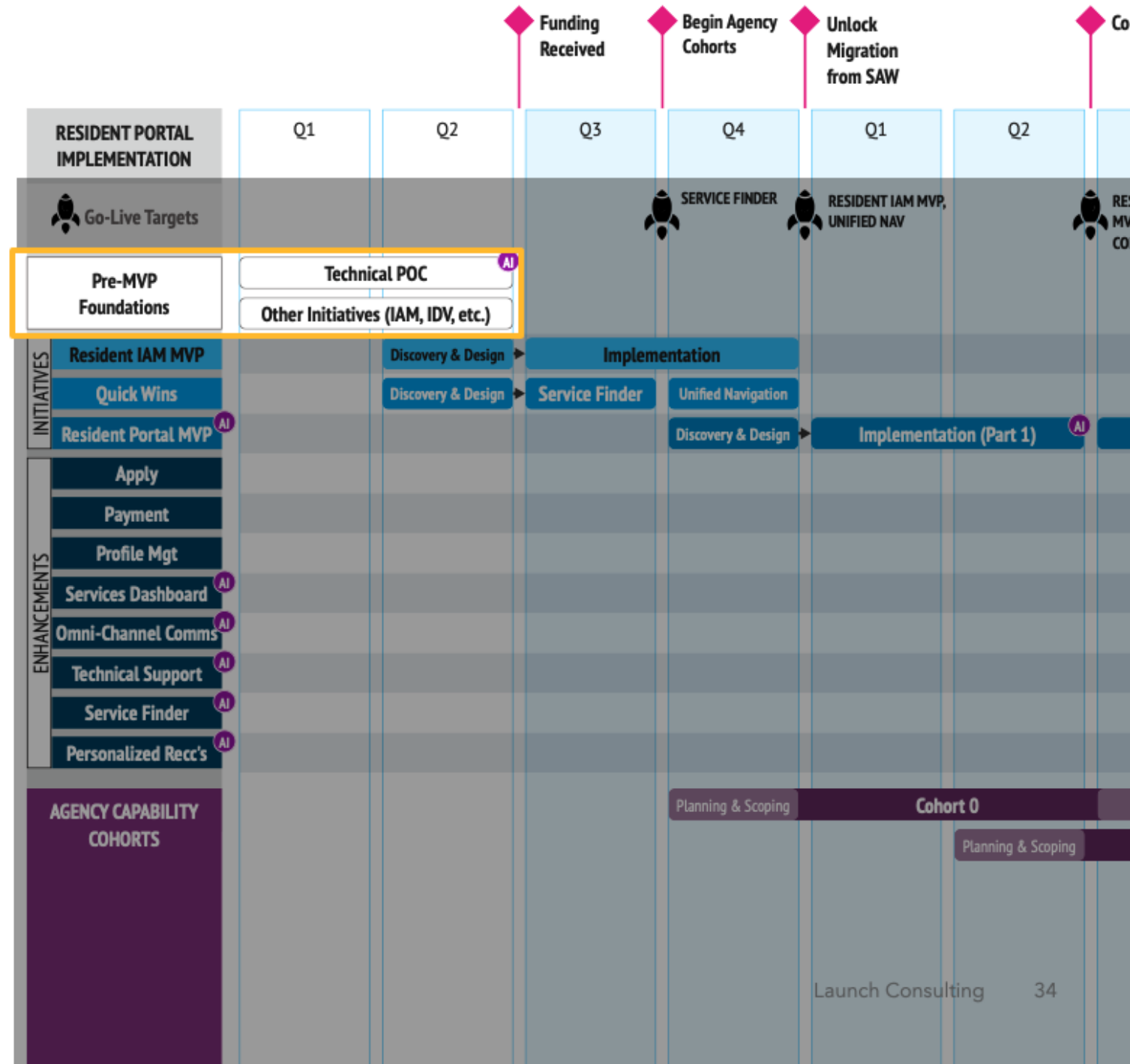


KEY
 AI Indicates initiatives and enhancements that leverage AI

October 11, 2024

1 Build Momentum

WaTech builds early momentum for the Resident Portal development via at least one technical Proof of Concept and the alignment of interconnected supporting initiatives such as IAM and IDV.

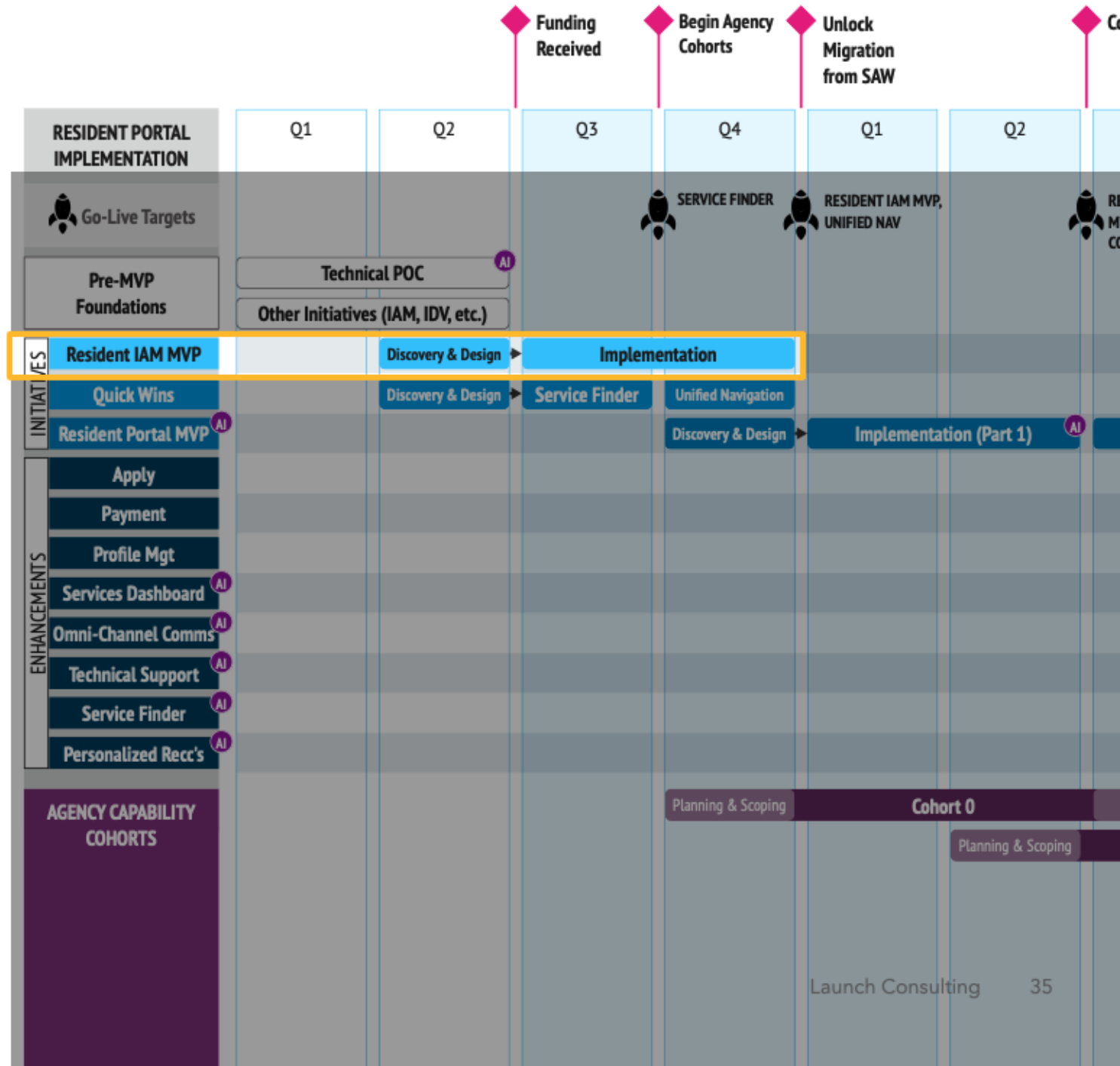


2 Resident IAM MVP

Starting with the disbursement of funds mid-2025, the Resident Portal will initially prioritize the replacement of the existing SAW capabilities that are outside of the IAM initiative's scope, such as Service Finder and profile management, with the goal of unlocking the ability for WaTech to begin migrating off of SAW in early 2026.

CAPABILITIES

- Create & Delete Resident Account
- Unique Resident Identifier
- Create & Manage a Personal Profile
- Browse, sort, and filter Services
- Find and contact an Agency
- Services Dashboard: See a List of My Services
- Technical Support
- Knowledge Base
- Share Resident Portal content with others
- Translation Support
- Consolidate/Transition SAW Accounts

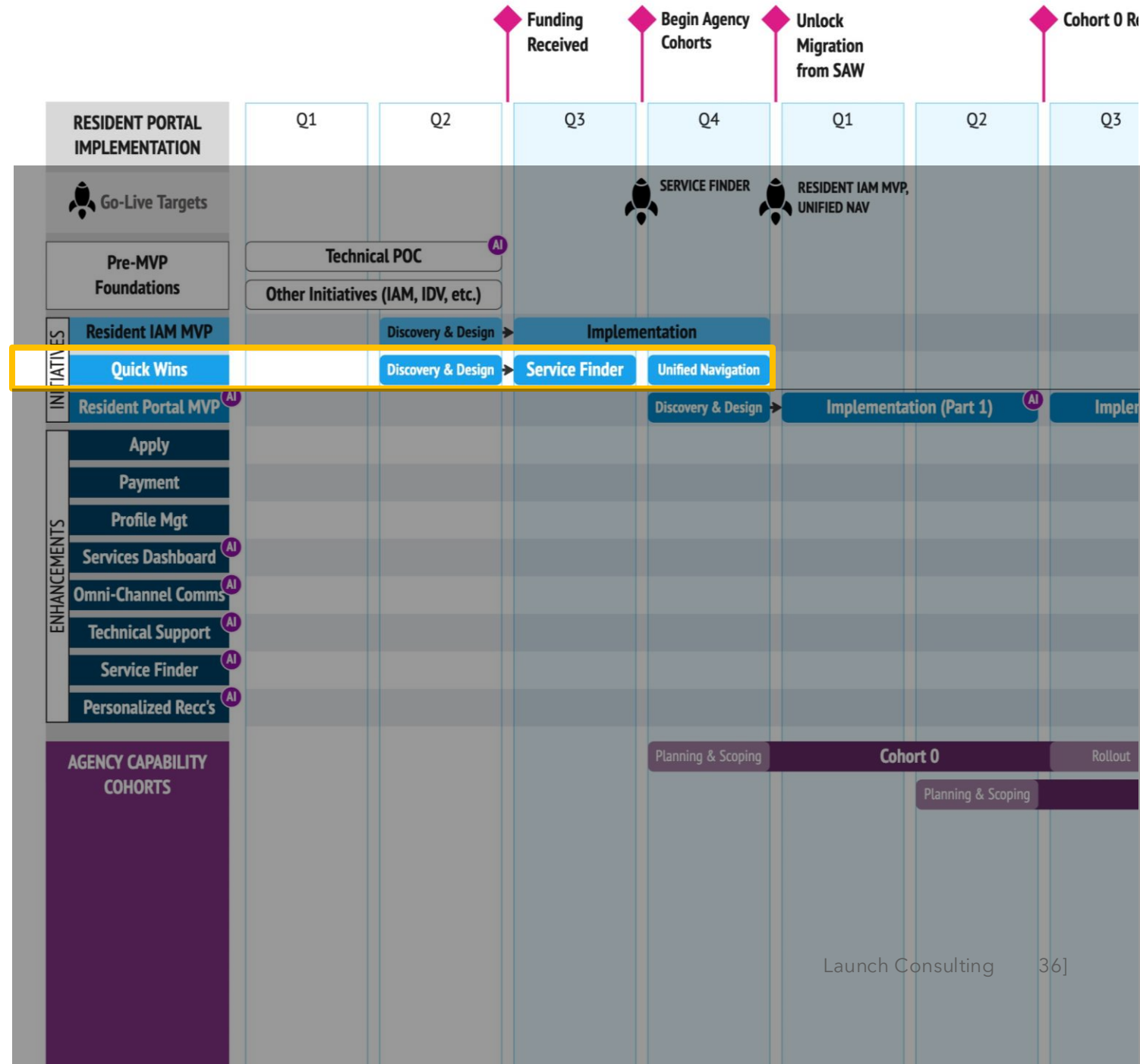


3 Quick Wins

Demonstrating early success is crucial for building momentum and confidence in the Resident Portal initiative.

Parallel to the Current State Replacement effort, WaTech can gain early **quick wins** by focusing on two smaller features that will support anonymous users and begin to engage agencies in collaborating in the portal experience.

- 1. Service Finder**
 A preliminary unauthenticated experience that provides residents with links out to various agencies.
- 2. Unified Navigation**
 A reusable component and standard header for Agencies to add to their websites that links back to the Portal.

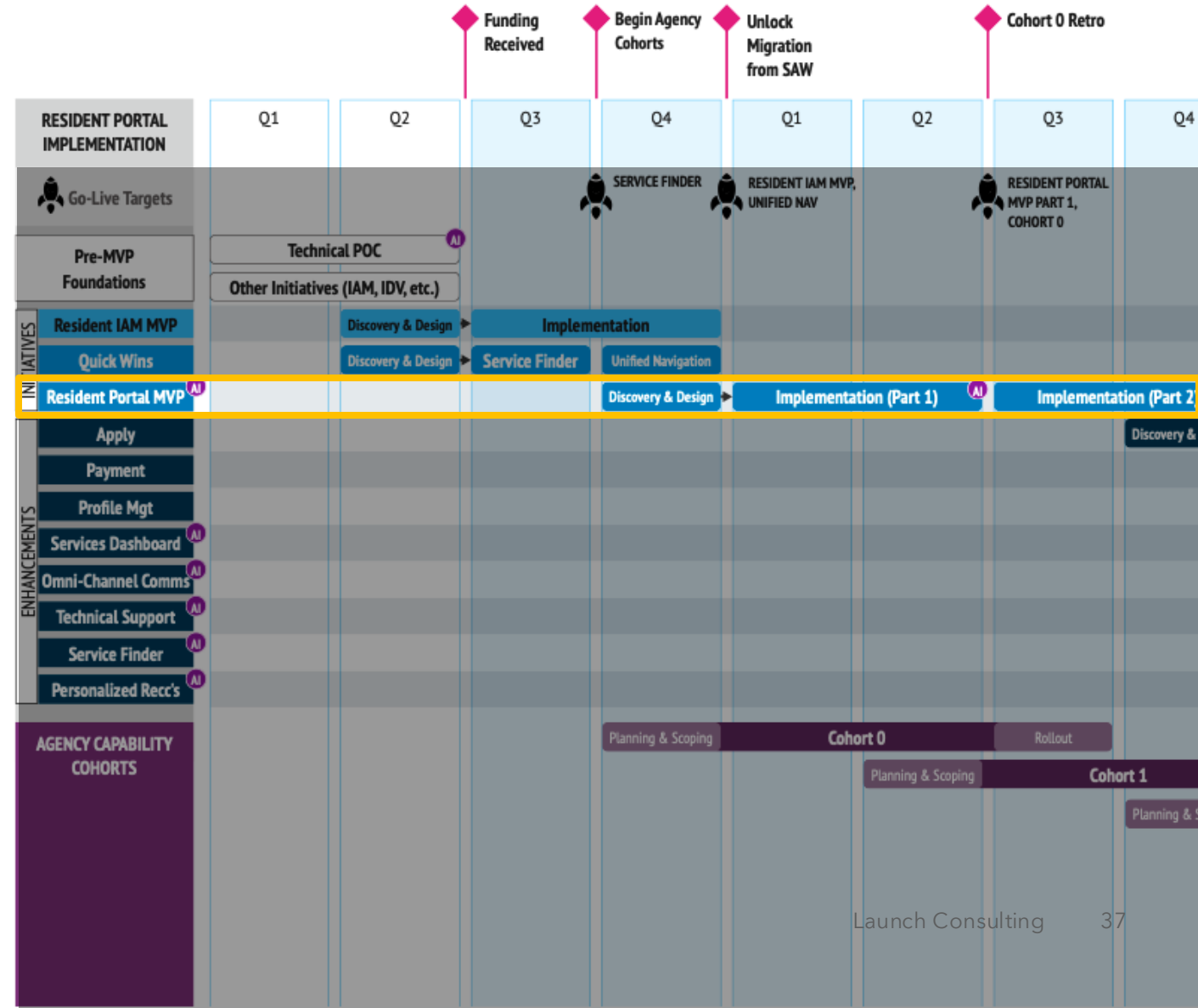


4 Resident Portal MVP

A set of initial capabilities and enhancements that create an enticing value proposition to residents and agencies.

CAPABILITIES

- Personalized service recommendations
- Automatic, proactive service recommendations
- Enriched services information
- Separate professional/business profile
- Services Dashboard: See the status of applications and services
- Single point of entry for technical support queries
- Alerts, updates, reminders, & notifications
- Enhancements to Favorites
- Personalized preferences (e.g. language & notifications)

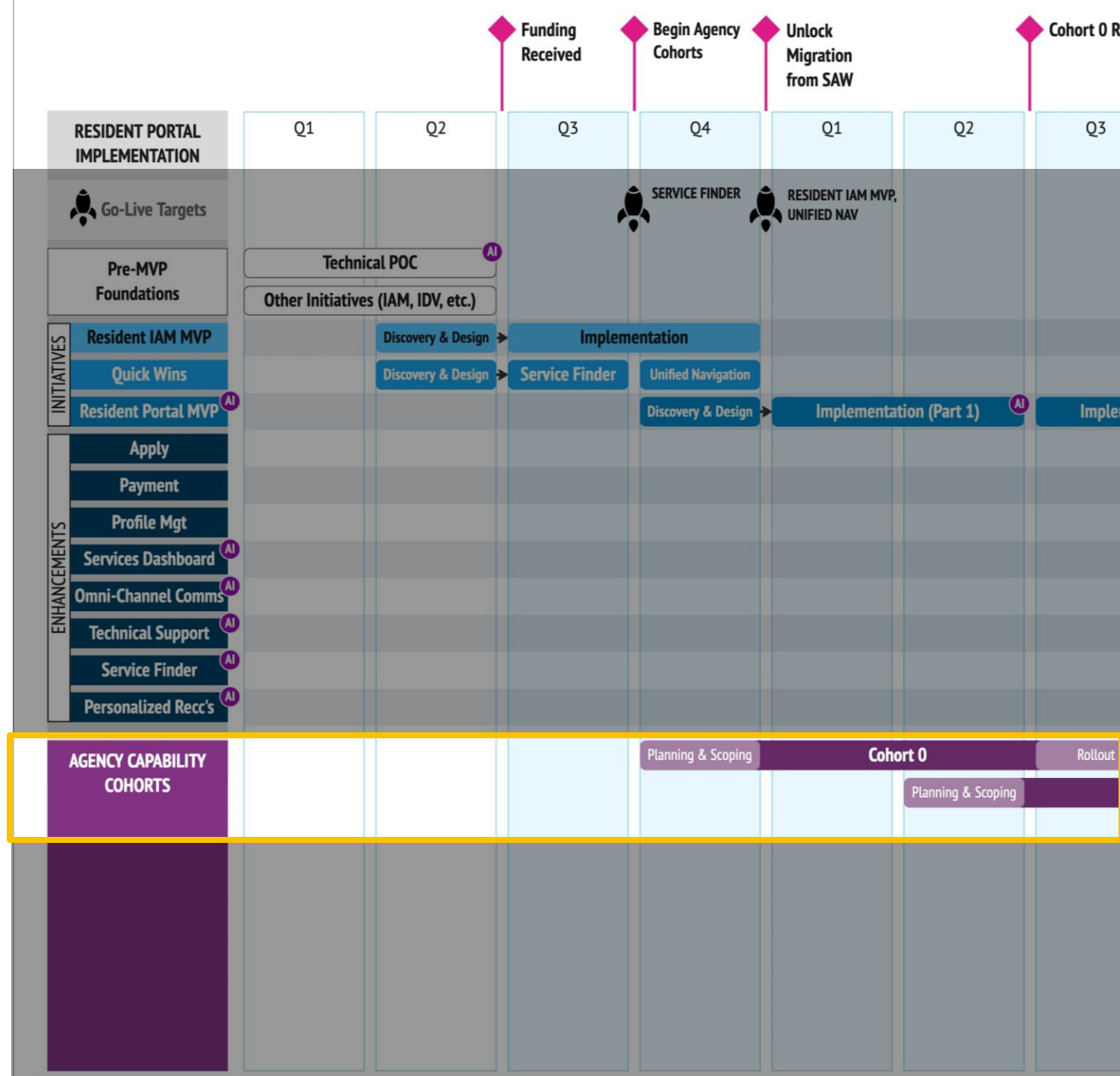


5 Agency Capability Cohort Strategy

Beginning **Q3 2025** as part of the **Resident Portal MVP** initiative, WaTech will begin to use a long-term approach to implementation that actively seeks partnership and collaboration with state agencies for identifying, prioritizing, and implementing new Resident Portal features and enhancements.

Rather than investing time in features agencies won't use, the **Agency Capability Cohort Strategy** follows a three-stage approach:

- 1. Cohort Planning & Scope Definition:** WaTech identifies a collection of new capabilities and a few partner agencies to collaborate with on their development. Together, WaTech and the selected partner agencies decide which capabilities are the most practical and highest value.
- 2. Cohort Implementation:** WaTech and the partner agencies collaborate on the development and implementation of the selected capabilities.
- 3. Cohort Go-Live and Rollout:** Once development is complete, the implementation goes live according to a go-live plan, the partner agency staff receives training, and legacy technologies are sunset.



Capabilities: Defining What Residents Need to Accomplish



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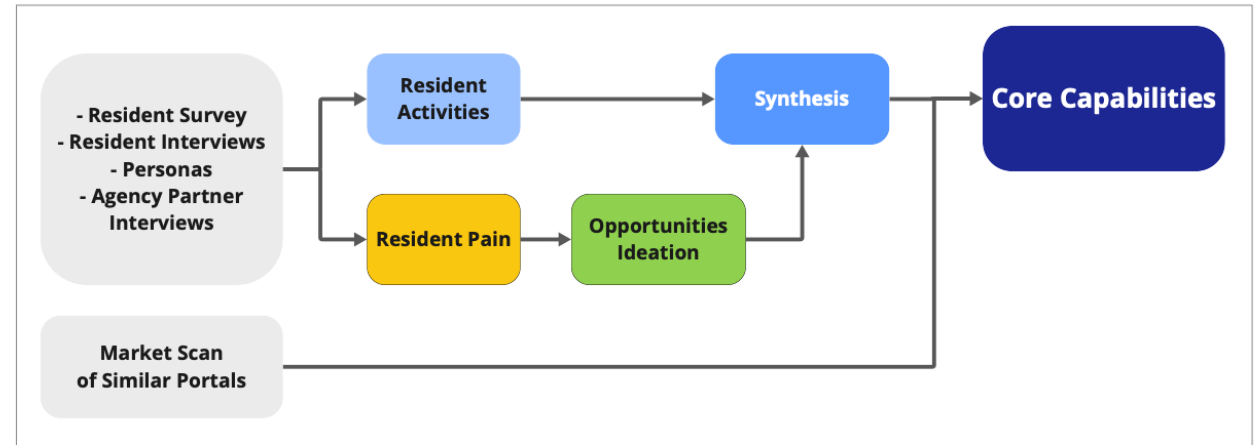
Snoqualmie National Forest, WA

Resident Portal Capabilities

We employed a human-centered process to define the resident capabilities that the Resident Portal should enable.

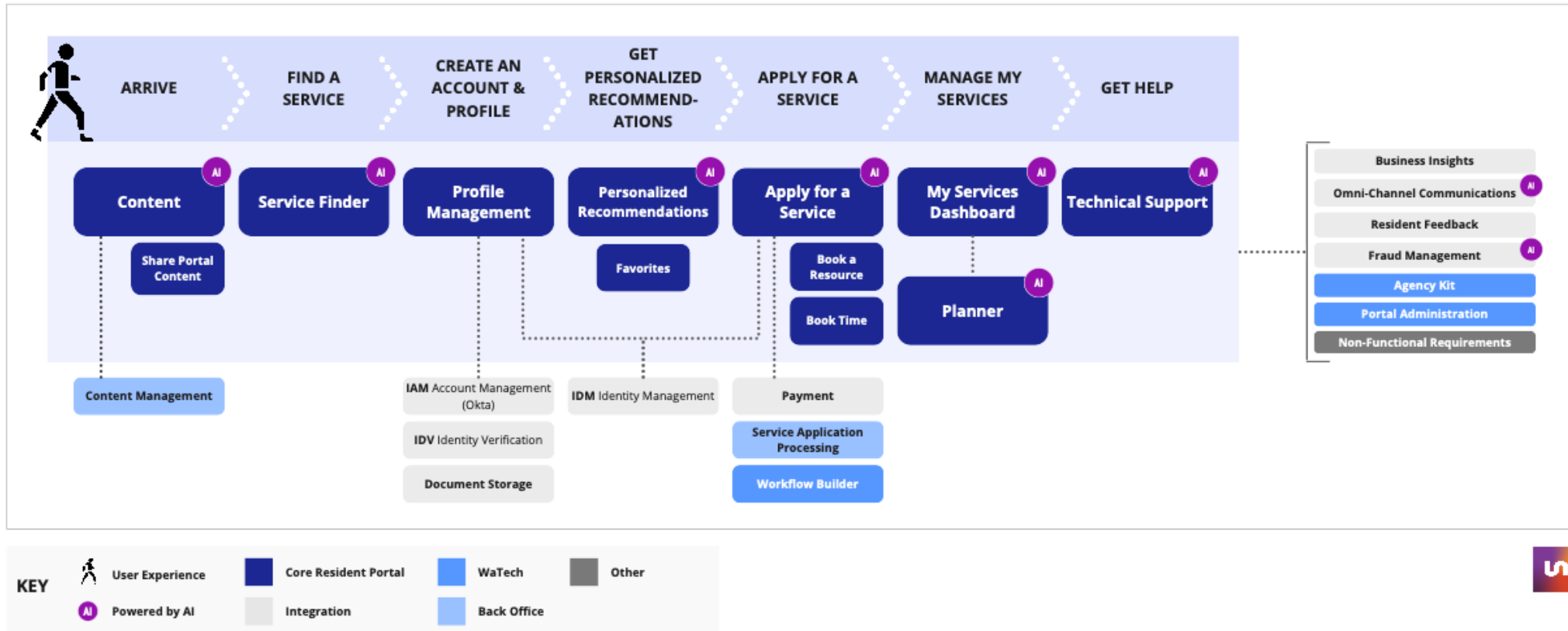
1. Intake existing user research (survey and interviews) and personas
2. Conduct interviews of representative Agency partners for additional context about their experience.
3. Identify resident activities (tasks and goals they wished to accomplish) and pain that needed solutions.
4. Ideate opportunities for resident pain points.
5. Synthesize into capability definitions, informed by Market Scan information.
6. Iterate and refine.

Human-Centered Process for Defining Capabilities



Resident Portal Capabilities - Overview

The resulting set of capabilities aligns at a high level with a resident journey, solving the needs presented at each phase. During iteration, we classified the capabilities as either core to the Resident Portal, candidates for integrations with the portal, back office, administrative (WaTech) and other.



Note: Summary of the capability details can be found in the appendix below

Next Steps



Valleyfest, Spokane Valley, WA
Photograph by Myk Crawford, CC-BY 2.0



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Next Steps for the Resident Portal

A roadmap is just the beginning of an adventure. Here are the immediate next steps Launch recommends for WaTech:

TECH REQUIREMENTS

- ❑ Continue evaluating digital experience platforms: LifeRay, Jahia, and ServiceNow
- ❑ Explore prototypes for key portal enablers:
 - Big Foot Bot | AI, Digital Experience Platforms, Agency Integrations, Shared Services
- ❑ Data Architecture Discussions
 - Continue data architecture discussions with other initiatives overlapping and touching the boundary of the Resident Portal
- ❑ Cost Analysis and Pricing
 - Request enterprise pricing and cost model options for software solutions under consideration, to evaluate budget implications and maximize ROI.

VISION, OBJECTIVES & GOALS

- ❑ Share with agency partners
 - Identify mutual alignments
- ❑ Success Measures
 - Determine a baseline measure for each success measure
 - Contextualize each success measure to set target values and dates
 - Refine success measures iteratively, as the Roadmap is implemented

MARKET RESEARCH

- ❑ Continue conversations with States
 - Organize discussions with representatives from Tennessee, Maryland, and Utah to learn about their state portals

OTHER / GENERAL

- ❑ Craft a Marketing / Pitch Deck
- ❑ Leverage roadmap for RFP creation
- ❑ Port the roadmap into a management tool such as ProductPlan

Thank You!



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Lake Twenty-Two, Granite Falls, WA

Appendix



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Washington State Ferry, Puget Sound, WA

Personas Reference (1)

Prior to the beginning of the Resident Portal Roadmap engagement, WaTech conducted user research culminating in 5 personas that fundamentally informed the roadmap definition. The personas information is represented here for context.

Persona groups



Resident Portal

These personas are intended to identify the Resident Portal user groups, their needs, goals, and how they speak about interactions with WA State government. A single resident may even be represented by multiple personas in a single day. They could be a Professional Supporter during their work hours, and a Casual Until Concerned Resident in their personal life. Or, a resident can experience a life event that causes them to move from one group to another. For example experiencing a sudden loss of income can move them towards being a Public Benefits Recipient; or becoming an Informal Supporter by helping a family member who is unexpectedly experiencing a mental health crisis. These personas are meant to represent all WA State residents and capture the different ways they interact with WA State government.

Purpose

What are personas? Personas are a powerful method for building empathy and looking at a website through multiple perspectives. They help drive project decisions because they are grounded in the real needs and barriers of current and potential users.

Data sources

Where did we get the information that informed these personas? Personas included in this document were derived from user research conducted by Anthro-Tech between February 15, 2024 and June 17, 2024.

Survey and interview details

We administered an online 35 question survey on the WA.gov website and via other government agency partners through their websites, email distribution lists, social networks, and flyers posted within offices and on ferries. In total, 1,393 people completed the survey and we recruited 20 people representative of emerging user groups to provide feedback in 1:1 interviews.

Main findings

From the user research, 5 persona user groups were identified. These include:

1. **Public Benefits Recipients** (for example, unemployed, unhoused, unstable)
2. **Informal Supporters** (for example, friends and family)
3. **Professional Supporters** (for example, case worker, non-profit organization)
4. **Regulated Business and Professionals** (for example, therapist, paramedic, business owner)
5. **Casual Until Concerned Residents** (for example, motorist, voter, camper)

Global themes

Across user groups, communication interaction preferences and strategies seem to be similar.

- Online-first interactions; using things like Google searches and government websites to accomplish as much as they can remotely and flexibly, at any time of day.
- Then, escalating to a phone call or going in person to get answers about technicalities or circumstances not addressed by general information provided online.



Personas Reference (2)

Public Benefits Recipients



Our stories

Artist with unreliable income

Government usually wants you to do things by phone, or mail, or sometimes in-person which isn't convenient for me. Like, the landlord forced me to move out of my apartment and so I had to beg my old roommates not to change the door code because I knew there were letters there waiting for me. In another case, my food assistance was cut because they counted some things as income which I didn't expect. I was constantly on the phone trying to sort that out. It's also hard to use some financial benefits because I'm never sure where that money will actually be accepted. I spent half a day driving around wasting gas, only to find out I couldn't use the money where I really needed it. Being poor is a full-time job.

Misdirected claimant

When I talk to the government, I just want to know what to expect. One time I was trying to get help with paying medical bills and the woman on the phone told me up front that they were behind. She said it might be 6 to 8 weeks before they get back to me and that I probably wouldn't get approved. So even though it wasn't good news, I appreciated that she was honest with me. But another time, I reached out to an agency about an issue and they took forever to answer me. They made me feel ignored, like my problem didn't matter. And in the end, it was just a big waste of time! Their website made it seem like they could help with my situation, but they couldn't do anything for me. I felt like a victim with no rights.

Timely assistance seeker

I've asked local nonprofits and community groups about food banks or pantries, but I never really thought to reach out to government organizations for things like that. I know I can visit the Department of Social & Health Services website for long lists of links or referrals to resources, but I haven't gone that route. Food and housing are things I need to take care of immediately. If I have to wait, I won't have a bed to sleep in tonight or something to eat today.

Goals

- Get what I need to survive
- Know how long it will take to get help
- Learn exactly what I will get from a service, along with how and where I can use it
- Discover resources that are relevant and available for me

Needs

- Referrals to other services and resources that might help me
- Less waiting on the phone, in line, or to hear about a decision
- Flexible ways to prove my identity
- Less stress around updating my personal information
- Opportunities to give feedback and feel seen and heard



Resident Portal

We regularly interact with the government to receive basic living assistance because we often don't have a stable income or financial security. This government assistance can be the life preserver keeping us afloat, but sometimes it's just not enough... We want to escape the cycle of poverty, but we frequently have to juggle maintaining our benefits, staying on top of uncertain housing situations, and working multiple jobs to make ends meet. It can all feel like too much.

Characteristics

- Likely experienced a loss of income
- Likely looking for work or not employed
- Likely close to government services
- Likely to have less formal education

Services and benefits used

- Food assistance
- Housing assistance
- Medical bill or insurance assistance
- Unemployment benefits

Frequency between Interactions

Interacts with moderate frequency.



Income



Personas Reference (3)

Informal Supporters



Our stories

Mother of unemployed son

I didn't believe my son could be calling about his unemployment benefits every day for three months and not getting anywhere. So, I tried calling for him but got hung up on after being put on hold. When I called back, I chose the option for "overpayments" assuming I might reach someone more quickly. Amazingly, it took only 10 minutes for someone to answer. After being transferred to another person and waiting a couple of hours, they explained that they were waiting for a judge to review my son's claim and that they needed more information from him. None of the emails they sent my son said anything about this.

Husband of mentally distressed wife

My wife went through a really difficult period with her mental health because of her job. She couldn't work anymore, so I looked into ways to help her get benefits. The application forms asked for a specific start date, but I didn't know how to answer that because she had other benefits and this was an ongoing health issue. I think I contacted the Employment Security Department, but I'm not sure. The whole situation was very stressful and we both felt under duress, so I didn't really care which agency I was talking to. We just needed help.

Father of disabled adult son

I manage benefits for my adult son who has a disability and lives in a group home. They handle his day-to-day needs, but I still need to help with finances, disability payments, and other parts of his life. His group home and case managers couldn't get him a wheelchair for over a year because they keep changing staff members, so I'm now working with the Department of Social & Health Services.. They said they would take care of it, but it's been a few months and I probably need to follow up.

Goals

- Support my family member through a difficult time
- Help loved ones get benefits I know about
- Discover benefits unfamiliar to me that could help my loved ones
- Manage ongoing benefits for my relative with a disability

Needs

- Clear descriptions of new government services and improvement initiatives
- Staff who can flexibly communicate in a variety of remote ways
- Information that's easy to read and understand
- Designated access and control of another's account



Resident Portal

We interact with government on behalf of our friends and family members to help them get the benefits they need. This could be because they're unable to interact themselves, or because we know what assistance is available and how to get it. Sometimes we interact only once for a specific issue. In other cases, we manage ongoing needs for multiple years.

Characteristics

Likely has loved ones suffering injury, disability or loss of income

Likely employed full or working part-time

May be Spanish speaking

Benefits and services used

Food assistance

Medical bill or insurance assistance

Unemployment benefits

Frequency between Interactions

Interacts with low frequency.



Income



Personas Reference (4)

Professional Supporters



Our stories

Certified peer counselor

I work with government agencies to help at-risk youth and formerly incarcerated people. I watch virtual resource center meetings, talk to my co-workers, and do research to learn about services they need, like getting a bus pass. I also help them understand their release order requirements, like paying child support or going to support group meetings. I walk people through applications, and answer questions. Sometimes I fill out their forms because I'm faster, but sometimes they need space to do it on their own. Once I gave someone information about joining the police. Six months later, I learned he had applied, trained, and passed all the physicals and tests without telling me. I'm proud to know that a little push helped him turn his life around.

Veterans Affairs case manager

As a case manager at one of Washington's Veterans Transitional Housing facilities, I work with our veteran residents so they can confidently return to living independently. All of our residents were previously unhoused, and a lot of the residents have a substance use disorder, PTSD, or other mental health challenges. The Transitional Housing Program gives residents a safe space and much-needed support. And it's not just housing and mental health services, we also provide assistance with veterans' benefits, and vocational rehabilitation opportunities. Even though this job can be hard, especially if a resident is struggling to abide by program rules, it's just really rewarding work. These veterans have given their lives to serve their country and we need to be giving back to them too.

H-2A solutions provider

My company navigates the difficult and time-consuming application processes for government agencies involved in the H-2A program, allowing farmers to hire migrant guest workers with temporary and seasonal work visas. We help our clients get a stable workforce at a competitive price and teach them about the changing requirements so they can avoid being shut down or paying legal fees. This means writing contracts months in advance and working with growers to post accurate job listings. It takes so long to get things done with the government, so I need to file requests for labor certifications and screen applicants at the same time. I also coordinate last minute transportation and housing options based on workers' needs and preferences.

Goals

- Connect people with resources to improve their lives
- File taxes for multiple businesses
- Teach clients about rules, resources, and reporting requirements

Needs

- Clear and manageable timelines with reminders
- Simple status information
- Historical records I can keep
- Designated access and control of another's account
- Forms that save my progress
- Networking between me and resource contacts for direct recipients
- Updates about politics and policies related to communities I work in



Resident Portal

We interact with government resources and regulators all the time on a paid-professional basis. For resources, we work with caseload individuals or families to get them on track through connections we research and coordinate for them. For regulated professionals, we work with business clients to keep them in compliance and to leverage our expertise, so they can just focus on running their business. Government rules and services are vast and complex. Without us, people would be lost and overwhelmed on their own as newcomers. It's also very important for us to stay on top of politics and to advocate for our group interests with legislators.

Characteristics

Likely employed full time

Likely in office & public administration, accounting, finance and/or health industry roles

Likely has undergraduate or graduate college degree

Benefits and services used

Food assistance Housing assistance

Medical bill or insurance assistance

Unemployment benefits Business taxes

Business and Professional Licenses

Labor recruitment, reporting and safety/health audits

Frequency between Interactions

Interacts with very high frequency.



Income



Personas Reference (5)

Regulated Business and Professionals



Our stories

Winery founder

I'm setting up my business in a very specific, uncommon way. As part of a routine review, the Liquor and Cannabis Board recently contacted me to make sure I met all the requirements for an alcohol license. Unfortunately, I did not. I had filed online and was approved conditionally, but they told me that I applied for the wrong license, it would be cancelled, and I would be refunded. Even though their website is supposed to guide you to the correct license application, I guess I should have talked with someone before applying. In the end, I'm not upset. I'm glad they corrected me and put me on the right track to be ready before next year, when I'll have products to sell.



Paramedic

When I moved here from Turkey, it was stressful to figure out the requirements to transfer my paramedic license and college degrees. I was out of work for almost six months! It wasn't clear which coursework I needed to provide. I wasted a lot of time trying to contact my first college and get translated transcripts and syllabi because the titles didn't match. Also, it was hard coordinate because they needed to send the documents to the Department of Health instead of me. I can't be the first person to deal with this, I was shocked that they didn't have a translator to help. It was very disappointing and frustrating; we're all trained to do the same thing. It's too much to have to verify your identity, requirements, and past complaints or suspensions.



Freight service agent

I work for a trucking company and have decades of experience managing fleet licensing, registration, and taxes for commercial freight operators. I help my company comply with laws and rules by handling things like paperwork and filing returns. With dozens of operators and hundreds of vehicles on our books, I bulk order as many plates and stickers as I can but end up going back and forth with the Department of Licensing weekly. I call or email them regularly to sort out appointments, payments, and missing or incorrect information. Their online system has made my job easier, but I wish I could upload data from our fleet management software instead of reentering it by hand. It's always hard to get drivers on the road to log in when there's bad reception or no nearby Wi-Fi.

Goals

- Understand which credential option is the right one for me to pursue
- Get myself and my practice up and running
- Continually re-asses to validate I have what it takes to succeed in my business
- Find and establish networks of knowledge based on my professional needs

Needs

- Clearly defined and manageable timelines with reminders
- Career credentialing path and training guidance
- Relief recommendations while I am waiting on government approvals to start work
- Reliable government points of contact to build ongoing professional recognition and relationships



Resident Portal

We interact with government to establish ourselves as credentialed professionals and businesses. We want to grow and succeed as early as possible, but feel held back by excessive red tape, such as lengthy application and verification processes. We could pay to have someone else handle our government affairs for us, but don't think that we should need to, and would rather do it ourselves rather than take away from our bottom line.

Characteristics

- Likely employed full time
- May be Spanish speaking
- Likely to have an undergraduate or graduate college degree

Benefits and services used

- Business and Professional licenses
- Business taxes
- Employment experience and identity verification
- Unemployment benefits
- Medical bill or insurance assistance

Frequency between Interactions

Interacts with somewhat low frequency.



Income



Personas Reference (6)

Casual Until Concerned Residents

Resident Portal



Our stories

Everyday motorist

I try to rely on myself as much as possible, so I only interact with the government when I have to, like when I renew my tabs every year and my driver's license when it's about to expire. They always mail me whenever I need to do those things. The only other time I'd interact with the government is if I got pulled over by the state patrol, but I try not to do that too frequently.

Savvy camper

Every year our family takes a camping trip to the same spot where we meet up with friends and relatives. I've figured out that the system lets us book earlier than others by extending our stay with dates we won't use and will cancel later. Before figuring this out, I'd need to visit the website at 7 a.m. on the exact date nine months in advance like everyone else. Also, one time we were running late to check-in for our campsite reservation. We didn't have an express lane pass and probably wouldn't make it on time without one. Even knowing we wouldn't use it often, we set up an account because it didn't cost much and would save us a couple bucks if we ever did need it.

Contractor victim

I hired a contractor to do some work and looked him up with the state. There weren't any problems with his license and he had a lot of good reviews. Unfortunately, it quickly went downhill from there. After many delays, I found out he improved his own home to flip it for a large profit. I contacted the state licensing board and was told they couldn't do anything other than take note of it. They said I could get free legal help as a senior but gave me a list of lawyers who weren't interested. Eventually I found one who would only talk to me for \$300 an hour plus another \$1,500 to explore my case. Contractor fraud is a big problem and I don't understand why the state isn't doing more to help.

Goals

- Follow everyday citizen requirements
- Seek protections or compensation for being wronged
- Talk to someone who knows enough to help with my unusual case

Needs

- Services organized by what I need, not by agency names
- People who can help me instead of just saying "no" or redirecting me
- Ongoing state government presence and connections via my local community
- Timely aids to raise awareness and engagement in current/upcoming government incentives and/or public event programs



We don't think that we interact with government very much. When we do interact, it's only because we have to, whether that means following the law, or getting specialized help for an unusual problem. We are open to learning about more services that could be relevant or available to us, but presume there isn't much worth the extra time and effort to look into.

Characteristics

- Likely college educated
- Likely full time employed or retired

Benefits and services used

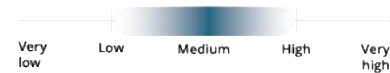
- ID card applications or renewal
- Motor vehicle registration or renewal

Frequency between Interactions

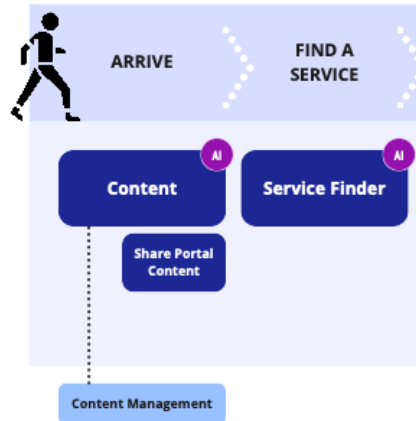
Interacts with very low frequency.



Income

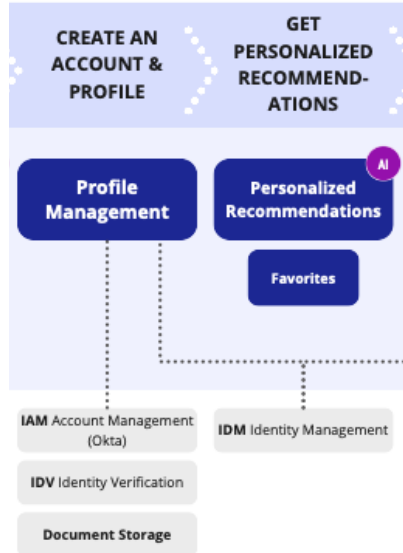


Resident Portal Capabilities - Detail (1)



Capability	Description	Expected Business Outcomes
Content	The Content section is a compilation of the information and content needs indicated by user research. Content will be enriched via AI where applicable.	<ul style="list-style-type: none"> • Reduced support inquiries and cost • Improved resident satisfaction <p>Supports GOAL #3</p>
Share Portal Content	The Share Portal Content capability enables users to easily share content such as custom search results, agency contact info, and URLs via a variety of methods and channels.	<ul style="list-style-type: none"> • Broader visibility and awareness of the Resident Portal and its content. <p>Supports GOAL #1</p>
Content Management	The Content Management capability enables the creation and management of all types of Resident Portal content.	<ul style="list-style-type: none"> • Increased efficiency in creating and managing resident content in a way de-coupled from IT infrastructure. <p>Supports GOAL #3</p>
Service Finder	The Service Finder capability enables foundational Services search and browsing features. Recommendations are based on available data. For unauthenticated users, the recommendations are based on user inputs to a search field or wizard questionnaire, business rules, and information about services and agencies.	<ul style="list-style-type: none"> • Reduced support inquiries and cost • Increased use of services by qualified residents • Improved resident satisfaction <p>Supports GOALS #2 and #3</p>

Resident Portal Capabilities - Detail (2)



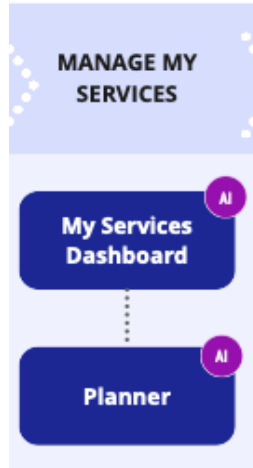
Capability	Description	Expected Business Outcomes
Profile Management	The Profile Management capability enables Residents to establish and manage all aspects of personal, professional, and subsidiary profiles.	<ul style="list-style-type: none"> • Reduced support inquiries and cost • Improved quality of data about residents, leading to improved insights • Increased resident autonomy, trust, and satisfaction <p>Supports GOALS #3 and #4</p>
Personalized Recommendations	The Personalized Recommendations capability provides authenticated Residents with service recommendations that are informed by a resident's profile information and services history. The recommendations may be served automatically (e.g., when profile information is updated) or as a result of a manual query or questionnaire.	<ul style="list-style-type: none"> • Reduced support inquiries and cost • Increased use of services by qualified residents • Improved resident satisfaction <p>Supports GOALS #2 and #3</p>
Document Storage	The Document Storage capability enables Residents to store frequently-used files related to services applications.	<ul style="list-style-type: none"> • Increased ease of use and efficiency for residents <p>Supports GOAL #3</p>
Favorites	The Favorites capability allows users to save and manage links to Resident Portal materials such as recommended services and informational content.	<ul style="list-style-type: none"> • Improved data and insights about resident behavior and preferences • Improved resident satisfaction <p>Supports GOALS #2 and #3</p>

Resident Portal Capabilities - Detail (3)



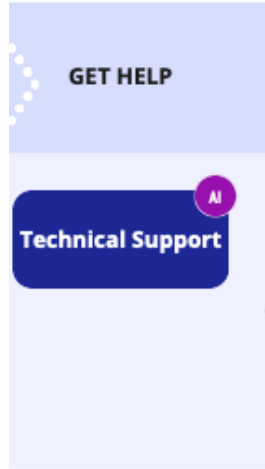
Capability	Description	Expected Business Outcomes
Apply for a Service	The Apply for a Service capability enables the automatic and manual completion of a wide variety of process flows / workflows. This includes one-time and recurring renewals.	<ul style="list-style-type: none"> • Reduced time spent in application processes • Increased use of services by qualified residents • Increased on-time fee payments <p>Supports GOALS #1, #2 and #3</p>
Book a Resource	The Book a Resource capability enables automatic and manual reservations of locations (such as a campsite or event venue), and physical resources. This is a subset of the Apply for a Service capability.	<ul style="list-style-type: none"> • Reduced time spent in resource booking processes • Increased use of resources by qualified residents <p>Supports GOALS #2 and #3</p>
Book Time	The Book Time capability enables automatic and manual reservations of calendar time (such as on an individual calendar or Agency schedule). This is a subset of the Apply for a Service capability.	<ul style="list-style-type: none"> • Increased scheduling efficiency <p>Supports GOAL #2</p>
Payment	The Payment capability enables payments by residents and payment processing by Agency personnel.	<ul style="list-style-type: none"> • Increased on-time fee and fine payments • Increased resident satisfaction <p>Supports GOALS #2 and #3</p>
Service Application Processing	The Service Application Processing capability enables automatic and manual administering of all types of Resident service applications by an automated process, Agency employee, or other authorized personnel.	<ul style="list-style-type: none"> • Increased efficiency of back-office application processing • Accelerated time to service <p>Supports GOALS #2, #3, and #4</p>
Workflow Builder	The Workflow Builder capability enables the creation and management of Apply for a Service processes.	<ul style="list-style-type: none"> • Improved ability to create and maintain efficient application workflows that suit Agency needs <p>Supports GOAL #2</p>

Resident Portal Capabilities - Detail (4)



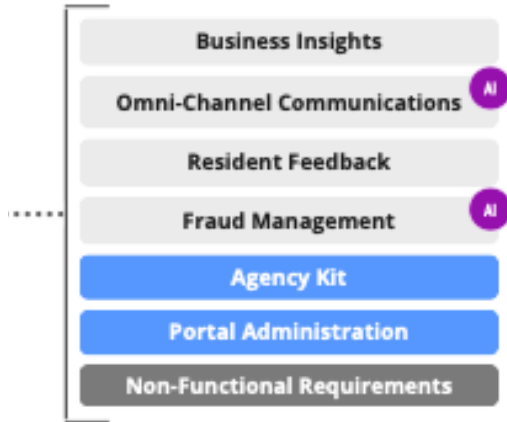
Capability	Description	Expected Business Outcomes
My Services Dashboard	The My Services Dashboard capability provides Residents with timely information and guidance about their own active services and those of other profiles for which they have permissions or delegated access. The content of the Dashboard adjusts based on the type of Profile (personal, professional) and permissions.	<ul style="list-style-type: none"> • Reduced support inquiries and cost • Increased timeliness of renewals and corrections • Increased use of services by qualified residents <p>Supports GOALS #2 and #3</p>
Planner	The Planner capability enables automatic and manual task creation, prioritization, scheduling, and management.	<ul style="list-style-type: none"> • Increased quality of application content • Increased use of services by qualified residents <p>Supports GOALS #2 and #3</p>

Resident Portal Capabilities - Detail (5)



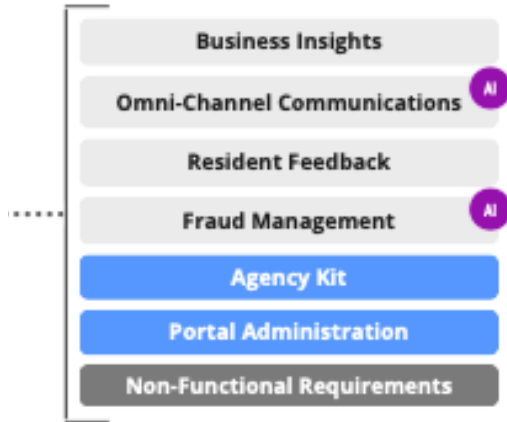
Capability	Description	Expected Business Outcomes
Technical Support	The Technical Support capability provides passive and active technical support for Resident Portal users.	<ul style="list-style-type: none">• Reduced support inquiries and cost• Improved customer trust and satisfaction Supports GOALS #3 and #4

Resident Portal Capabilities - Detail (6)



Capability	Description	Expected Business Outcomes
Business Insights	The Business Insights capability enables automatic and manual report creation and management.	<ul style="list-style-type: none"> Improved resident insights across the Resident Portal, enhancing data-driven decision making <p>Supports GOAL #1</p>
Omni-Channel Communications	The Omni-Channel Communications capability enables automatic and manual communications via selected channels, including one-way (no reply option available) and two-way.	<ul style="list-style-type: none"> Improved communications with residents, including those with disabilities Increased resident awareness and satisfaction Reduced support inquiries and cost <p>Supports GOALS #1, #2, and #3</p>
Resident Feedback	The Feedback capability enables the gathering and analysis of Resident feedback.	<ul style="list-style-type: none"> Improved resident insights and alignment with their needs Increased resident satisfaction and trust <p>Supports GOALS #1, #2, #3, and #4</p>
Fraud Management	The Fraud Management capability enables automatic and manual identification and administration of potential fraud.	<ul style="list-style-type: none"> Reduced fraud Reduced “false positive” application denials for qualified, non-fraudulent residents <p>Supports GOALS #1 and #2</p>
Agency Kit	The Agency Kit is a searchable collection of policies, guidelines, templates, and other resources that enable agencies to successfully prepare for and manage their integration with the Resident Portal.	<ul style="list-style-type: none"> Streamlined integration process for agency partners <p>Supports GOAL #2</p>
Portal Administration	The Portal Administration capability enables management of Resident Portal user groups, permissions, and settings, among other features.	<ul style="list-style-type: none"> Foundational, ongoing ability to manage the Resident Portal in an efficient manner <p>Supports GOAL #4</p>

Resident Portal Capabilities - Detail (7)



Capability	Description	Expected Business Outcomes
Non-Functional Requirements	Non-Functional Requirements include important user experience requirements such as accessibility and usability that should be considered for each functional capability.	<ul style="list-style-type: none"> Increased compliance with accessibility requirements for government Increased ease and coherence of the Resident Portal experience Increased resident satisfaction and trust <p>Supports GOALS #3 and #4</p>
AI ("BigFoot Bot")	The BigFootBot AI capability enables intelligent search results, personalized recommendations, conversational guidance, and white glove assistance - all powered by AI.	<ul style="list-style-type: none"> Accelerated solutions to meet resident needs Reduced support inquiries and cost Increased process efficiency Increased resident satisfaction <p>Supports GOALS #1, #2, and #3</p>