

ESO Portal Discovery Project

Co-design Insights

Summary



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Acronyms

CBD	Computer based decision
CFMS	Client Feedback Management System
CIO	Chief Information Officer
Co-design	Co-design is a process for developing solutions, initiatives and strategies directly with stakeholders – both the eventual users and the partners and staff who will deliver them.
DVA	Department of Veteran’s Affairs
ESO	Ex-service Organsiation
ICT	Information and Communications Technology
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ISH	Integrated Support Hub
MyOrg	DVA’s third party digital system to support organisations authorised as nominated representatives to carry out their client representative role.
MyService	DVA’s digital system to support individual veterans, dependents or their nominated representatives (including advocates who complete a D9325 form) to lodge claims, track their progress and request reviews of decisions.
PD	Process Direct
PRODA	Provider Digital Access
VSAS	Veteran’s Systems Assurance and Support

ESO Portal Discovery Project - Co-design Insights Summary

1. Introduction

As part of the Modernisation Program, the Ex-Service Organisation (ESO) Portal Discovery Project team has conducted research with advocates who help veterans and their families lodge claims or reviews, and with DVA staff in business units that play a service role in the system. This research provides the evidentiary foundation for a future state technology solution proposal. The following report provides a summary of the insights derived from this research¹.

DVA is using co-design approaches to gain a deep understanding of the ESO Portal *system*: the people, processes and technology that enable the service. Co-design brings together experience insights from users of the system. Users include the people who will benefit from the service – advocates, veterans and their families – as well as the DVA staff who deliver the service, to create solution co-designs informed by each other’s expertise.

The co-design goal was to gather practical evidence and insights that could be used to identify improvement opportunities for the advocate community to transact with DVA by:

- ❑ using a co-design approach by exploring problems collaboratively and proposing solutions that are grounded in user need
- ❑ optimising co-design outcomes through meaningful engagement with the most representative stakeholders in inclusive ways that foster productive knowledge building
- ❑ considering previously collated information and insights from claims representation advocates
- ❑ establishing the foundation for ongoing co-design activities with the advocate community.

2. Co-design Activities

Co-design activities commenced with discussions with the Deputy Commissioners in each state to gain an understanding of the advocate community in their regions. Contextual considerations indicated the most effective and inclusive project co-design activities, having regard to rigour, optimising participation, time and available resources were:

- An online survey of advocates

¹ It should be noted this summary reflects the comments, responses and feedback collated through co-design activities – no conclusions, judgements or refinements have yet been made on the accuracy of this data and it is accepted that some commentary may not reflect current practices or in-flight project outcomes.

- Targeted interviews with advocates
- Interviews with relevant DVA business units

Consistent with best practice co-design, analysis of feedback from advocates relating to lodgment of claims or reviews received through internal DVA channels was also undertaken.

3. Insights

Insights are derived through synthesis - the process of bringing all the findings from the analysis together in an endeavor to explain why users behave as they do, and by applying knowledge to facts to extract conclusions.

- The names of the **multiple registration/claim system touchpoints** that can be used by advocates to submit claims on behalf of their clients (MyService, myGov, MyOrg, ESO Portal, PRODA²) are frequently used interchangeably without a clear understanding of their differences. For example, the name of the advocate portal was commonly referred to as PRODA rather than the ESO Portal. This has impacted findings that specifically reference any one system.
- Advocates are largely ambivalent about the type of system they prefer, but are clear that it should be a **single, consistent, reliable system** that provides *all* the functionality they need to do their work effectively. Neither the current ESO Portal nor MyService, either singularly or jointly, provide this required functionality for advocates. The significant use of the paper/email claim submission channel (30%) appeared to relate more to the inadequate functionality of these systems than a resistance or inability to transact digitally.
- The significant **volume** of claims, compiled by larger ESOs in particular, means **automation** is key to efficiency and accuracy. For example, editable pre-filling of information previously provided; the ability to seamlessly upload larger files (up to 20 pages) and a reliable search function will support advocate task management. Automation was also a clear focus of DVA service delivery teams including the ability to leverage computer based decision making and automated verification processes; automated alerts for submission of outstanding evidence and automatic withdrawal of unsubstantiated claims after a determined period.

² **MyService** is the digital system that supports individual veterans, dependants or their nominated representatives (including advocates) to lodge claims, track their progress and request reviews of decisions. It is accessed via a **myGov** account.

The **ESO Portal** is the digital system that supports advocates to lodge claims, track progress and submit reviews of decisions on behalf of veterans and their families.

MyOrg is DVA's third party digital system that supports organisations authorised as nominated representatives to carry out their client representative role on behalf of veterans and their families. Both the ESO Portal and MyOrg are accessed via a **PRODA** account.

- ❑ The **claims backlog** has influenced the behavior of advocates with many noting the tension between the desire to submit a 'decision ready' claim with the need to gain a place in the claims assessment queue given the impact on commencement date for approved claims.
- ❑ The confusion relating to the multiple registration/claim system touchpoints has also affected the approaches advocates take to registering their client's consent to act on their behalf. Some advocates register as a nominated representative (via a D9325 form) using MyService; others register as a claim representative using the ESO Portal. Issues were noted in both these system processes. The D9325 form is inconsistent between digital versions, does not allow for electronic signatures and is difficult to upload. Examples of ESO portal issues included the difficulty in re-allocation of a claim from one advocate to another within an organisation (with client permission). This means advocates must change the way they work (eg. sit at a colleague's desk to review a mentee's draft or default to using MyService). In the ESO Portal, each claim must be reassigned individually which is too time consuming for many advocates.
- ❑ **Quality** is a prominent focus for both advocate and DVA staff. A desire to measure the value added by the work of advocates in terms of claim accuracy, completeness and timeliness highlighted the importance of improved **analytics and reporting**. These are also primary requirements for DVA.
- ❑ Compilation of a claim on behalf of a client is an iterative, time-consuming and subjective process requiring a broad range of personal and technical skills. **Flexibility** in how claims are completed and submitted is fundamental to this work. This includes extensive editing capability; and the ability to submit a diverse range of claim types, against multiple Acts, as a single claim or as a claim including multiple conditions.
- ❑ Similarly, the **provision of options** will permit greater nuancing of an individual claim to suit their client's unique situation, for example, inclusion of tick-boxes to flag urgent/life threatening claims. A completeness indicator (eg. 'decision-ready') could reduce backlog impacts whilst preserving application dates.
- ❑ Because advocates are often working with vulnerable people, **inclusion** is requisite to trust. Advocates want their clients to have easy access to the work done on their behalf, with the option to choose the degree of access according to the client's preference. Conversely, visibility of the client's previous claims history for the advocate, that is accurate and complete, reduces impost on the veteran and increases efficiency for advocates.
- ❑ **Greater transparency** of the claims assessment workflow may reduce the need for frequent communication with DVA from advocates who wish to keep their clients updated. A more detailed view of where the advocates claim sits in the assessment pathway, as well as a simple visual representation of progress compared to target (eg. a thermometer or bar graph) would meet the needs of both advocate and client.
- ❑ **Communication** was one of the key themes of this research. The lack of clarity around who DVA should communicate with on claims submitted by advocates (the advocate, the veteran or both) and the difficulty in advocates communicating directly with delegates (and vice versa),

for example, direct phone calls to delegate are unanswered; or advocates miss calls from delegates and are then unable to reach the delegate through a returned call, has adversely impacted trust.

- ❑ Many advocates work as part of a larger organisation in a traditional management structure. **Managers** need to be able to oversee the work of their team(s) and train advocates to use DVA's claim lodgement systems. Provision of a more detailed analytics/reporting functionality, better access to claims within an organisation and a 'sandbox' environment for trainee advocates would support this management role.
- ❑ Advocates are supportive of the need for advocacy training and are generally satisfied with the Advocacy Training and Development Program, noting a desire for greater frequency of courses. A focus on **digital literacy** with a unit/session focused on transacting with DVA through the ESO Portal and MyService is a current Program gap and may also support the 30% of advocates currently submitting paper/email claims to transition to digital channels.