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Building Human-centered Intake Applications

How might we design intake applications and processes to invite people in rather than weed people out?

Going Undercover

Another way of conducting research is by going undercover and playing the role of a social service seeker. We go undercover and try to use programs of different social services. We try to think from the lens of different personas: non-English speakers, those new to accessing social services, those who are not technologically savvy, etc. We note where we feel confused, misdirected, or unclear. We then brainstorm solutions to fix those issues.

A Red Tape Run-through of Intake Applications and Processes

We went undercover and tried to use several intake applications for different social services. We navigated websites and call lines as though we ourselves were seeking the service. This allowed us to identify common roadblocks seekers face. We identified gaps in access, prioritized areas for improvement, and got a first-person perspective of the process. At Connective we call this a "red tape run-through."

In performing a red tape run-through on intake applications, we saw pain points in three categories: eligibility, phone system navigation, and website navigation.

Eligibility

Examine your eligibility criteria and communication of those criteria through the lens of the seeker.

Pain Point	Recommendation
Though 9% of Houston-area residents are undocumented, applications are not clear upfront about whether they are eligible to apply. This often leads undocumented individuals and mixed-status families to assume that they are ineligible.	If you serve the undocumented population, clearly state it upfront. **Example:** "We're here to help regardless of immigration status," or "Estamos aquí para ayudar sin importar su estatus."
Seekers are often required to fill out lengthy applications just to find out that they are ineligible. This is frustrating and discourages them applying from programs in the future.	Start your applications with simple, technology-driven eligibility screeners that quickly help determine whether someone is likely ineligible. If someone is likely ineligible, let them know immediately after they fill out the screener. Provide these screeners to phone operators, including any receptionists, call centers, and 211 representatives, in instances where individuals are getting help filling out applications.
Wording on applications or websites is complicated, industry-specific, and includes acronyms with no definitions.	Put eligibility requirements into layperson's terms, and write at a maximum of an 8th grade reading level. **Example:** If income eligibility is based on Area Median Income (AMI) or Federal Poverty Level (FPL), provide a chart showing the income range.
Providing exact household income with supporting documentation can be extremely cumbersome, particularly for larger, multi-generational families.	Wherever possible, in designing your program, use proxies for income, including participation in a public benefit program that already screens for income and geographic area. **Example:** The United States Department of the Treasury is recommending using both geographic area and public benefit participation as a proxy for income for the COVID rental assistance funding that they've provided local jurisdictions.
Cumbersome document requirements can discourage and weed out the most vulnerable community members, particularly those who are less tech savvy.	Consider what can be provided through self-attestation. **Example:** A 2020 Harris County financial assistance program required documented proof of economic need (a late utility bill payment or rent statement, for example). The 2021 iteration of the program asked people to self-attest their economic need by answering a multiple choice question that captured why they needed the assistance.

Phone Systems

Call through your own phone system or the phone system of programs you fund.

Pain Point	Recommendation
Recording starts with a long initial English-language message, and only prompts the listener with other language options after a minute or more; often, the only other language offered is Spanish. This deters non-English speakers from finishing the entire voicemail message to get routed to their language (if it is even available).	Start all recordings with automated language selection. **Example:** "For English press 1, para español oprima 2, đối với tiếng việt, nhấn phím 3," then read the message.
Many recording systems direct people back to the website or email to submit applications. Many of the people calling in are calling for the very reason that they cannot navigate the website or lack technology literacy.	Provide an option to escalate to a human when someone requires assistance completing the application. If outside of business hours, ask them to provide their information and specify expectations about a call back. **Example:** Consider providing textbot options as well. "Text us at # to see if you are eligible."
Voice mailboxes can often feel like a black hole and can increase uncertainty and frustration during times of crisis.	For voice mailboxes, set clear expectations regarding next steps and timeline. Use specific language. **Example:** Leave your name and number along with a brief message and we will call you back in 3-5 days.

INSIGHT 34 Reducing barriers to entry is one of the most significant ways that social service providers can ensure resources are distributed equitably and quickly across communities. Consider how your organization can lead in removing these roadblocks — in your processes and tools — that delay assistance for those that need it the most.

Website Navigation

Visit the websites of the programs you fund and go through the intake process. Note where important information is located and how easy it is to access.

Pain Point	Recommendation
Often on websites, navigating to the application takes several clicks, which makes it difficult to find, particularly for clients with limited tech literacy.	Add a button that links to the application on the home page. Consider a custom, easier URL for the application that you can use in marketing flyers. **Example:** ConnectiveSurvey.org directs you to Connectivetx.org/stormsurvey

Websites are often not designed for ease of multilingual use.	Ensure that the option to translate the website is prominent on both mobile and desktop versions of your website. **Example:** Connective often uses a tool called Weglot for easy-to-use, professional, automatic website translations that update as you update your site.
Clients determined to be ineligible in the intake process are often left without clear next steps or relevant referrals. Though some agencies do provide a referral list for rejected clients (a best practice!), many are unhelpful referrals that may not address their need or eligibility.	Your rejected seekers are also your clients. Treat them with the same thoughtfulness and attention as you do your active clients. Direct them into specific, highly vetted resources that may meet their specific needs. **Example:** "You are ineligible because of [reason, e.g., the county you live in]. [Resource, e.g., name of agency] may be able to support you. Call [x] or visit [y] to learn more about [agency]."
Time commitment required by the application is often unclear. For individuals who already have limited time and many stresses, the lack of clarity can be a deterrent to completion.	Time how long it takes to fill out your application. If it takes more than 10–15 minutes, cut down the questions. In addition, give a time estimate upfront about how long the application will take to complete. For example, this application will take approximately 10 minutes to complete. Consider adding a % complete progress bar.
Seekers who aren't comfortable using technology for formal applications rely on informal navigators (family, church leaders, etc.) for accessing online resources. These seekers often tend to be elderly, non-English speakers, and immigrants.	Ask users if they are filling out application for themselves or on behalf of someone else, and then tailor the application to their answer. Ask users if they are able to upload documents given their technology constraints, and if they answer no, skip document upload questions and have a human follow up to help.
Requiring the disclosure of sensitive information may be a roadblock for two reasons: (1) It's information which could be embarrassing or make people uncertain if they want to apply. (2) It requires accuracy, and people who don't have access to this information may not consider themselves fit to provide the right information.	Provide a supporting reason for any sensitive information you may request, as well as clear direction for what to do if they do not have access to it. **Example:** When asking: "Please provide your household income," you can say, "The information below is required to help us understand [x] so that we can do [y] to help you. We understand that not everyone has access to their financial statements. When necessary, provide your best estimate, based on your judgment."