

CalSAWS Personas

Understanding Personas

What they are

Personas are a representation of users derived from real world data and research. Because they are an amalgamation of “real” people, they are presented as fictional biographies of users that include lifestyle notes, habits and interests, daily activities and more.

Why are they important

Personas help complete the picture of the customer experience lifecycle. They can identify and prioritize areas of opportunity within existing touch points and experience features. Personas are also used to validate and solidify use cases for the solution in the context of typical day-to-day life for each persona.

How do we use them

Personas provide a powerful tool for communicating about different types of users and their goals, needs, and motives. Based on the personas, we can decide which pain points to target in the design process and make sure we are designing the BenefitsCal with the users in mind.

About Me Description

An overview of each persona's unique life experience and current situation obtaining and managing benefits, and their usage of the existing California Benefits Website.

Defining Quote


A quote from a real user that depicts the needs and thoughts of that persona.

Mindset

Behaviors and motivations driven by how the persona thinks about their experiences


Traits & Preferences

Significant factors that impact each persona's distinctive experience. Based on the synthesis of the Customer Survey results in conjunction with field interviews and focus group observations.



Maria, 26

The First Timer



About Me

I'm a single mother. I have been on CalFresh for less than a year; I work part time at the local... I found out about the CA Benefits Website through my caseworker who... I visited the county office to submit my initial application. She told me that the CA Benefits Website would be the easiest and most convenient way for me to continue maintaining my benefits without having to wait for hours at the county office. So far, I mainly use it to check my EBT card balance and to see if there are any changes to my case. I think I will need to submit reports every six months to report changes, but I am not entirely sure when these reports are due.

My Pain Points

- Distinguishing Between Programs:** Confusing acronyms with no single place to learn about the requirements to apply for different benefits programs; no clear direction on how to access all available resources.
- Lengthy and Complex Application:** The number of questions on the application is unnecessary. It asks for so much information, with a lot of repetitive questions. The way the words are worded is not clear.
- Reporting Income:** There is no straightforward way for me to report part-time income, because my work schedule changes weekly. I'm also not sure how often I should be reporting a change in income, since these changes happen regularly.
- Appointment Scheduling:** I should be able to schedule my intake interview at a convenient time online. I have missed appointments because I had no idea of the appointment or the notice of the appointment.
- Lack of Information About How to Utilize Benefits:** It's not clear to me where I can use EBT cash vs. EBT food or where the nearest food banks are. It would be helpful if this information was easily accessible.

Mindset

Intimidated	Questioning
Uncertain	Anxious

Traits & Preferences

Comfort with Technology: [Slider from Uncomfortable to Comfortable]

Portal/Mobile Usage: [Slider from Low to High]

Support Needed Using the Portal/Mobile: [Slider from Low to High]

Years on Benefits: [Slider from 0 to 6+]

Overall Satisfaction: ★★☆☆☆

Key Pain Points*

A summary of key pain points for this persona based on the synthesis of multiple field interviews and focus groups.

*Key pain points represent insights from users collected during UCD field research. Due to existing California policies and regulatory considerations, not all key pain points may be addressed in the design of BenefitsCal.

Maria, 26

The First Timer



About Me

I'm a single mother. I have been on CalFresh for less than a year; I work part time at the local CVS. I found out about the CA Benefits Website through my caseworker when I visited the county office to submit my initial application. She told me that the CA Benefits Website would be the easiest and most convenient way for me to continue maintaining my benefits without having to wait for hours at the county office. So far, I mainly use it to check my EBT card balance and to see if there are any changes to my case. I think I will need to submit reports every six months to report changes, but I am not entirely sure when these reports are due.

My Pain Points

- **Distinguishing Between Programs:** Confusing acronyms with no single place to learn about the requirements to apply for different benefits programs; no clear direction on how to access all available resources.
- **Lengthy and Complex Application:** The number of questions on the application is unnecessary. It asks for so much information, and there is a lot of repetition. The way the questions are worded is not clear.
- **Reporting Income:** There is no straightforward way for me to report part-time income, because my work schedule changes weekly. I'm also not sure how often I should be reporting a change in income, since these changes happen regularly.
- **Appointment Scheduling:** I should be able to schedule my intake interview at a convenient time online. I have missed appointments because I didn't know about them or get the notice of the appointment.
- **Lack of Information About How to Utilize Benefits:** It's not clear to me where I can use EBT cash vs. EBT food or where the nearest food banks are. It would be helpful if this information was easily accessible.

“

My initial application process was difficult since I was not familiar with the government forms and definitions of information being requested.

”

Mindset

Intimidated

Questioning

Uncertain

Anxious

Traits & Preferences

Comfort with Technology

Uncomfortable

Comfortable

Portal/Mobile Usage

Low

High

Support Needed Using the Portal/Mobile

Low

High

Years on Benefits

0

6+

Overall Satisfaction



Dave, 37

The Tech-Savvy



About Me

I have been on benefits for several years and use the CA Benefits Website regularly. I am comfortable using technology, but just even looking at the home page, it's a little cluttered... A lot of the information can be filtered. It's also very difficult to get into contact with anyone from the county. My benefits were recently terminated, and I have been trying to contact the county using the number on the website, but I haven't received a call back yet. There should be an easier way to reach my caseworker if I need to.

My Pain Points

- **Website User Experience:** The website is very busy on a desktop. It's even harder to use when I access it on my phone, which is my preferred device when I'm on-the-go.
- **Account Access:** I want the system to be able to save my login information so that I don't have to type it in every time I access the website.
- **Digital Notifications:** I have requested to receive e-notifications about changes to my account via email, but I still receive all notifications by mail. It's frustrating!
- **Status Tracking:** I want to be able to view the progress of my case throughout each step of the benefits process on the portal. I would also like to receive a confirmation when my documents have been received and processed.
- **Completing Redeterminations Across Programs:** I wish to have my basic information carry over from one program's redetermination to another so I'm not typing in the same information over and over.

“

I like the fact that the online option is available. Less paperwork and you save time.

”

Mindset

On-The-Go

Seasoned

Confident

Frustrated

Traits & Preferences

Comfort with Technology

Uncomfortable

Comfortable

Portal/Mobile Usage

Low

High

Support Needed Using the Portal/Mobile

Low

High

Years on Benefits

0

6+

Overall Satisfaction





Melissa, 62

The Interested Non-User

About Me

I'm retired and I receive CalFresh and Medi-Cal. I mostly go into the office to renew my benefits. I rely on the mail to communicate with the county; that's how I submit my verifications. It's much easier for me to fill out the forms and mail them in. However, the mail has been unreliable lately. I would use the website if I knew my way around the computer and if the website had step-by-step navigation instructions. If it can save me the hassle of going to the county office or the stress from wondering whether my mail arrived in time, I would be willing to take the time to learn.

My Pain Points

- **Additional Benefits Eligibility:** I would like to see what other benefit programs I am eligible for other than CalFresh and Medi-Cal. I am not sure where I can find this information. I wish my case could be screened to check my eligibility for additional benefits.
- **Inter-County Transfers:** I was under the impression that when I move, my benefits would move with me; they didn't. I didn't have a doctor for two months. I would have liked to be able to schedule my transfer ahead of time so that I didn't have to wait to receive my benefits.
- **Periodic Reports:** I received a SAR-7 form in the mail, and it is asking me to report any changes. Nothing in my life has changed, do I still need to fill it out and send it back?
- **Late Recertification Notices:** I don't get notices to complete my renewal until past the deadline.
- **Reasons for Denial:** I've been denied benefits before, but do not understand the reasons why I was not qualified.
- **Contact with Caseworkers:** When I call the county office to ask questions, I often spend long periods of time on the line, waiting for a response.

“

Until my friend told me you could apply online, I didn't know. I thought you had to go in.

”

Mindset

Eager

Inquisitive

Deliberate

Patient

Traits & Preferences

Comfort with Technology



Portal/Mobile Usage



Support Needed Using the Portal/Mobile



Years on Benefits



Overall Satisfaction





Juan, 43

The Vulnerable



About Me

I am disabled and I prefer to speak my native language. I find it hard to use the CA Benefits website; the layout is not intuitive. I need guidance understanding the different aspects of the benefits process, and I rely on an assister at the food bank to help me with reporting my changes and submitting my renewals. I feel embarrassed when I don't know what to do. It's difficult for me to admit I need help.

! My Pain Points

- **Language Barrier:** The questions on the translated application are confusing. The language is too technical and complex; it's hard for me to comprehend.
- **Document Upload:** The process is very confusing, and I am never sure if I submitted the verification documents correctly.
- **People in the Household:** I'm uncertain about whether to include my housemates when stating the number of people living in my household. I split the rent with them, but I am the only person receiving benefits on my application.
- **E-Signature:** It's tricky. The system doesn't give me enough time to enter my date of birth and PIN code to verify my identity. After the 3rd try, the caseworker gave up and mailed me the paper form to sign.
- **Announcements:** I didn't realize the county office was closed, and I wish I had received an announcement with this information.
- **Public Charge:** I am wary about how receiving benefits might affect my American citizenship.

“

I did my application in-person because it was easier to get answers one-on-one. Language is a big barrier for me; I wanted to make sure all my questions were answered.

”



Mindset

Nervous

Hesitant

Confused

Grateful



Traits & Preferences

Comfort with Technology



Portal/Mobile Usage



Support Needed Using the Portal/Mobile



Years on Benefits



Overall Satisfaction




Anita, 56

The Supporter



About Me

 Multi-lingual

I work at a local food bank and assist customers in applying for and maintaining their CalFresh benefits. Whatever they need help with, I am there to support them. I love what I do! My goal is to teach customers to be self-sufficient. I take the time with each customer to walk them through the application process, help them create an account, and teach those who have access to the internet how to use the CA Benefits Website.

My Pain Points

- **Lack of Inclusivity:** Some of the questions on the application are not inclusive of all demographics. There are no non-binary gender identities to choose from or preferred pronouns. And the security questions are not all relevant to our immigrant population.
- **Account Access:** I spend a lot of time helping customers create and log into their accounts when they do not have an email address, forget what email address they used, or forget their login. I wish the website did not require an email address to create an account.
- **Status Tracking:** Because I am unable to track the status of individual customers' applications, I cannot step in when they miss their intake interviews, do not submit documents, or forget their renewals.
- **Transparency in Case Outcomes:** I feel in the dark about why customers are not receiving the benefits they have applied for and why they are sometimes losing their benefits.
- **Change Report:** It's frustrating when customers lose their benefits for not reporting changes in time. I could help customers maintain their benefits much better, if I was able to report changes for them.

“

We are trying to help people to become able. We don't want to hand feed them everything. [This way] they can understand [the] process and handle it themselves.

”



Mindset

Motivated

Focused

Prepared

Valued



Traits & Preferences

Monthly Completed Applications



Time Spent with Each Customer



Interaction with County Office



Benefit Process Assisted with

Applying for benefits

Reporting a change

Renewing benefits

Device Used to Assist Customers



Using a computer



Over the phone



Using a smartphone/tablet

Stephanie, 37

The Doer



About Me

I am an intake worker. I conduct intake interviews as well as assist customers with ongoing Medi-Cal, CalFresh, and CalWORKs cases. If customers seek assistance with SAR-7s or CalFresh recertifications, I can help them with that as well. I realize the urgency at which customers need to receive benefits, so I strive to process as many applications as I can every week. However, the existing portal is not set up in a way that provides adequate guidance to customers on how to fill out their applications and renewals accurately and completely. This slows down my ability to quickly determine their eligibility and process their cases.

My Pain Points

- **Incomplete Applications:** I spend additional time during intake interviews to help members fill in the missing information on their application that is needed for eligibility determination.
- **No-Shows:** Customers frequently miss their appointments or don't answer calls, which causes a delay in benefits processing.
- **Blank SAR-7s:** A lot of the SAR-7s I receive are blank even when the customers filled them out. For some reason, the data doesn't always get saved.
- **Renewals Submitted Too Early:** I'm not able to process renewals when customers submit them early.
- **Insufficient Document Upload Categories:** There are not enough categories for customers to upload documents to. They submit documents under the wrong categories. It can take a lot of time for me to sort through.
- **Invalid Verification Documents:** Customers submit verifications that are incorrect, blurry or illegible. I end up having to request them to resubmit the verifications.

“

It would be very beneficial if there was something to explain to [customers] the types of verifications they could use and a step-by-step process on how they can attach [documents] so it's a smoother process when we review applications.

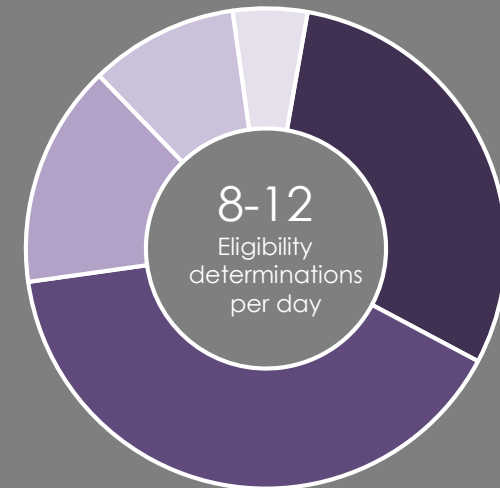
”

Mindset

Determined	Multitasking
Aware	Busy

How I Spend My Time

- Conducting intake interviews
- Determining eligibility
- Collecting and validating information
- Processing changes
- Responding to customer calls



James, 49

The Respondent



About Me

I am a call center worker. The customers that call in are very diverse, and their problems range from assisting with periodic reports for CalFresh, clarifying benefits received with CalWORKs, confirming application status for Medi-Cal, to change reporting for any of these programs. Every time I answer the phone, it is someone different with a different concern. To best assist customers, I need to have in-depth knowledge about all of the different benefit programs and about the different features and capabilities of the existing CA Benefits Website.

My Pain Points

- **Inability to See What the Customer Sees:** I cannot assist customers efficiently because I am not able to see the exact screen that they see. When customers tell me their issues and ask questions, I am often unsure what they are referring to.
- **Lack of a Training Environment:** I have no way to complete a training application myself on the website to get a better sense of the questions and difficulties customers face.
- **Update on Case Status:** I get daily calls from customers asking whether their applications have been received. It would be nice if customers were given a timeline for when their applications will be processed, so they don't have to call back every day.
- **Appointment Rescheduling:** I receive many calls to reschedule intake and renewal interviews. Customers should have the ability to reschedule appointments without having to speak with someone.
- **Resetting Passwords:** I often receive requests from customers to reset their passwords. They get frustrated because I can only walk them through the password reset process, not reset it for them.

“

As a worker, I have so much difficulty getting clarifications on how to use the website, that I really feel for the customer. I have a fear that the customer would go through all the steps and not get their benefits timely.

”



Mindset

Knowledgeable

Encouraging

Helpful

Informative



How I Spend My Time

- ▣ Answering customers' questions
- ▣ Confirming receipt of uploaded documents
- ▣ Providing status on applications
- ▣ Rescheduling appointments

