

## Using Technology to Streamline and Optimize the Application Process

*AFI Virtual Coffee Webinar Series*

*June 14, 2017*



Office of Community Services  
Administration for Children and Families  
U.S. Department of Health and Human Services

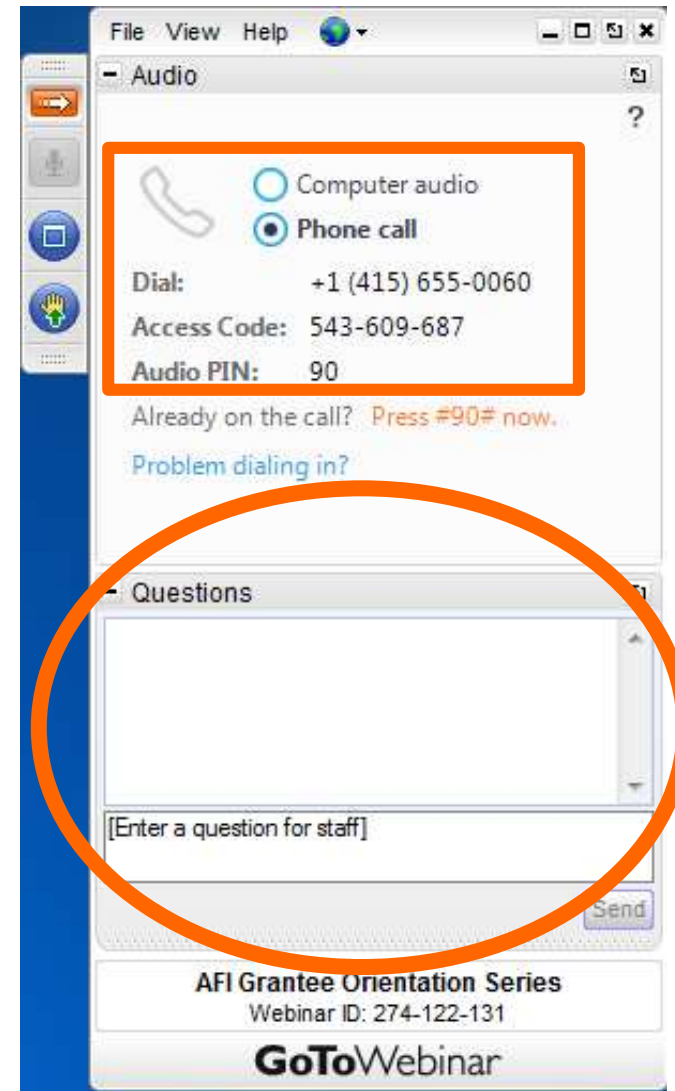


## Introduction of Speakers

- Santiago Sueiro, CFED
- Kristi Quinn, Jewish Family & Career Services
- Maggie Sanborn, Earn to Learn

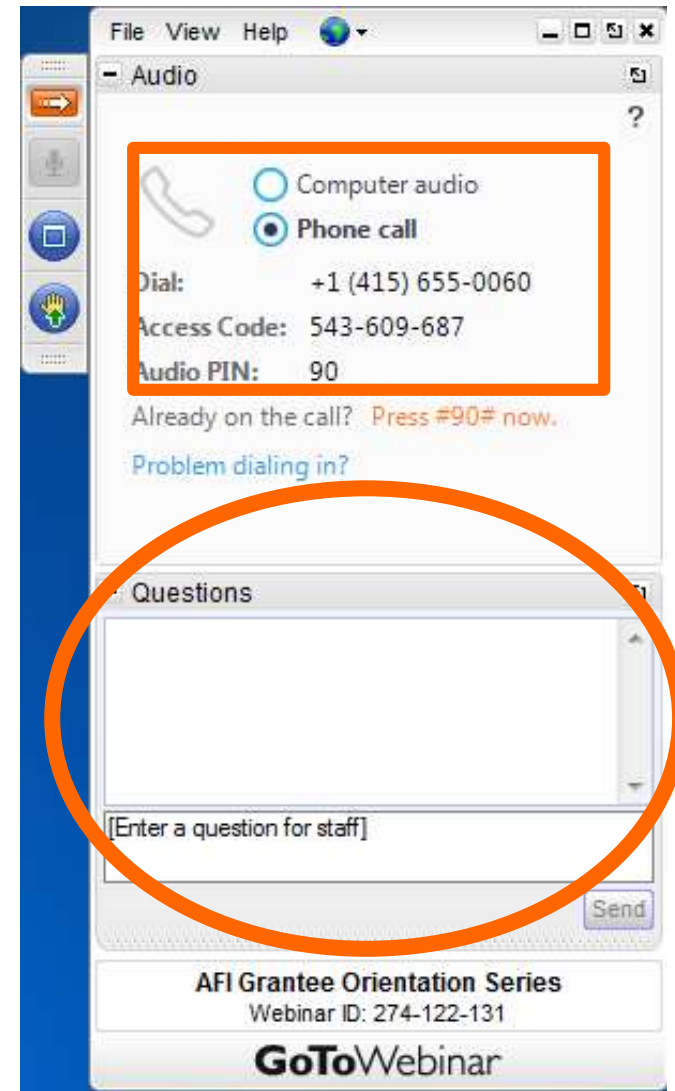
## Connecting to Audio

- Chose the appropriate audio setting (computer or phone)
- Ask a question any time by typing the question into the text box on the GoToWebinar Control Panel
- Experiencing technical difficulties?
  - Use the text box
  - Email us at [jvardag@cfed.org](mailto:jvardag@cfed.org)



## Housekeeping

- This webinar is being recorded!
  - All attendees are muted to ensure sound quality.
  - A video recording and transcript will be available on [idaresources.acf.hhs.gov](http://idaresources.acf.hhs.gov) at a later date.
- The webinar will last approximately 60 minutes.



## Objectives for Today

- Learn about the IDA application process and how to optimize the process using technology.
- Learn about fellow grantee experiences and challenges in using technological tools in their application process.
- Discuss the value added of using technology to optimize the application process.
- Discuss strategies and resources that are useful for selecting a technological tool.

## A Few Questions For You





What is your level of experience with managing an AFI project?



What is your role with your AFI project?





How satisfied are you with your existing application process?



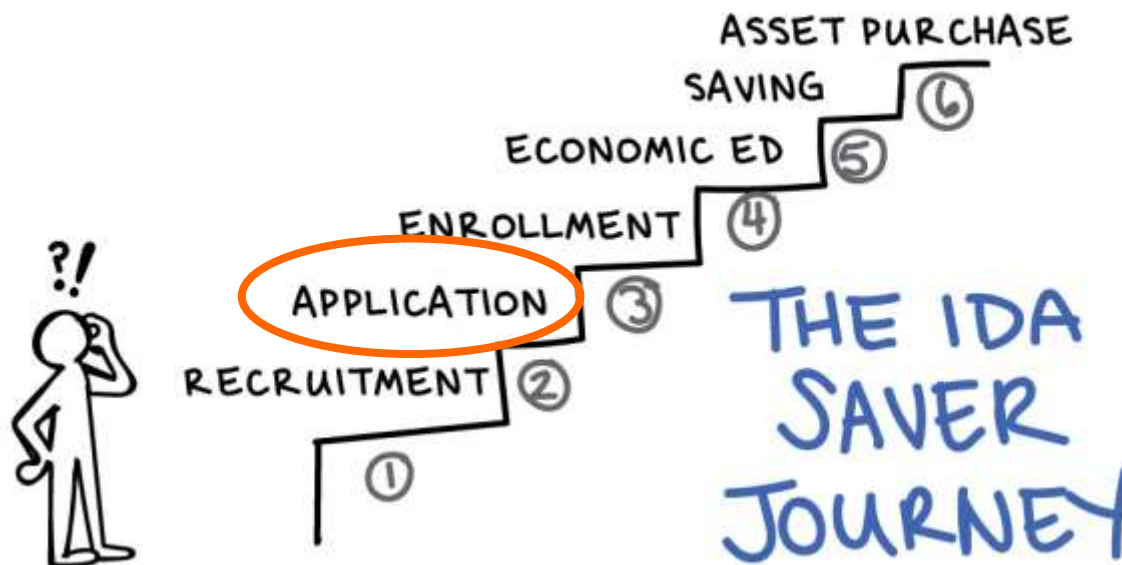
What do you prioritize most in an application process?



## A REFRESHER ON APPLICATION REQUIREMENTS



## AFI Requirements and Considerations: Application



## AFI Requirements and Considerations: Application

- Requirements
  - Eligibility
  - Comply with federal civil rights laws
- Considerations
  - Earned income
  - Additional, grantee-established eligibility criteria

## Participant Eligibility Requirements

There are two ways to determine  
eligibility:



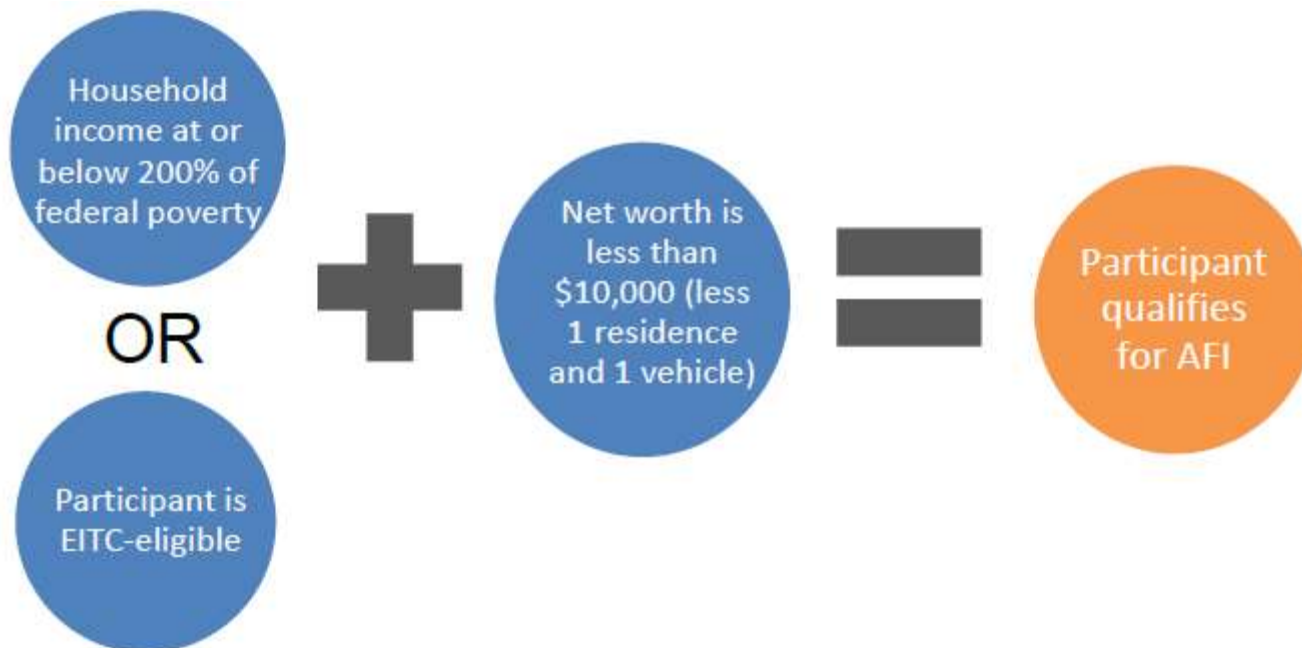
## Participant Eligibility Requirements

1. **TANF-eligible:** If a participant is eligible for TANF (Temporary Assistance for Needy Families) in your state, that participant *automatically* qualifies for AFI

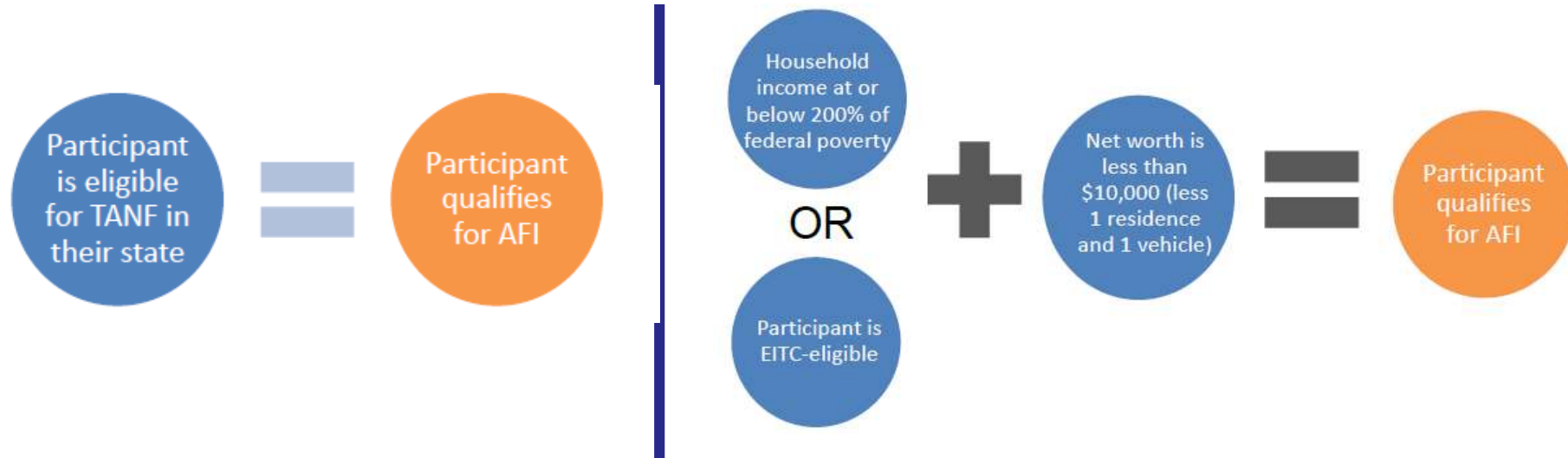


## Participant Eligibility Requirements

- Any individual who is a member of a household that meets both an **income test** and a **net worth test**



## Participant Eligibility Requirements



## PANELIST: KRISTI QUINN JEWISH FAMILY & CAREER SERVICES



# USING TECHNOLOGY TO STREAMLINE AND OPTIMIZE THE APPLICATION PROCESS

KRISTI QUINN

PROGRAM ASSISTANT, JEWISH FAMILY & CAREER SERVICES

LOUISVILLE, KY



# TECHNOLOGY IN THE APPLICATION PROCESS: WHY DO WE NEED IT?

- This provides a way to mass-market your IDA program to more potential clients.
- For employer-based IDA programs (like ours at JFCS), it allows the employer to pre-screen clients and provide them with this link after they gauge the clients' interest.
- An online application provides the client with the freedom to fill it out in their own time and upload the required documents instantly.
- Let technology work for all of you when it comes to collecting documents, either by uploading them with the application or recommending taking pictures or screenshots of documents and emailing them.



# THE ANSWER FOR US?

## COGNITO FORMS

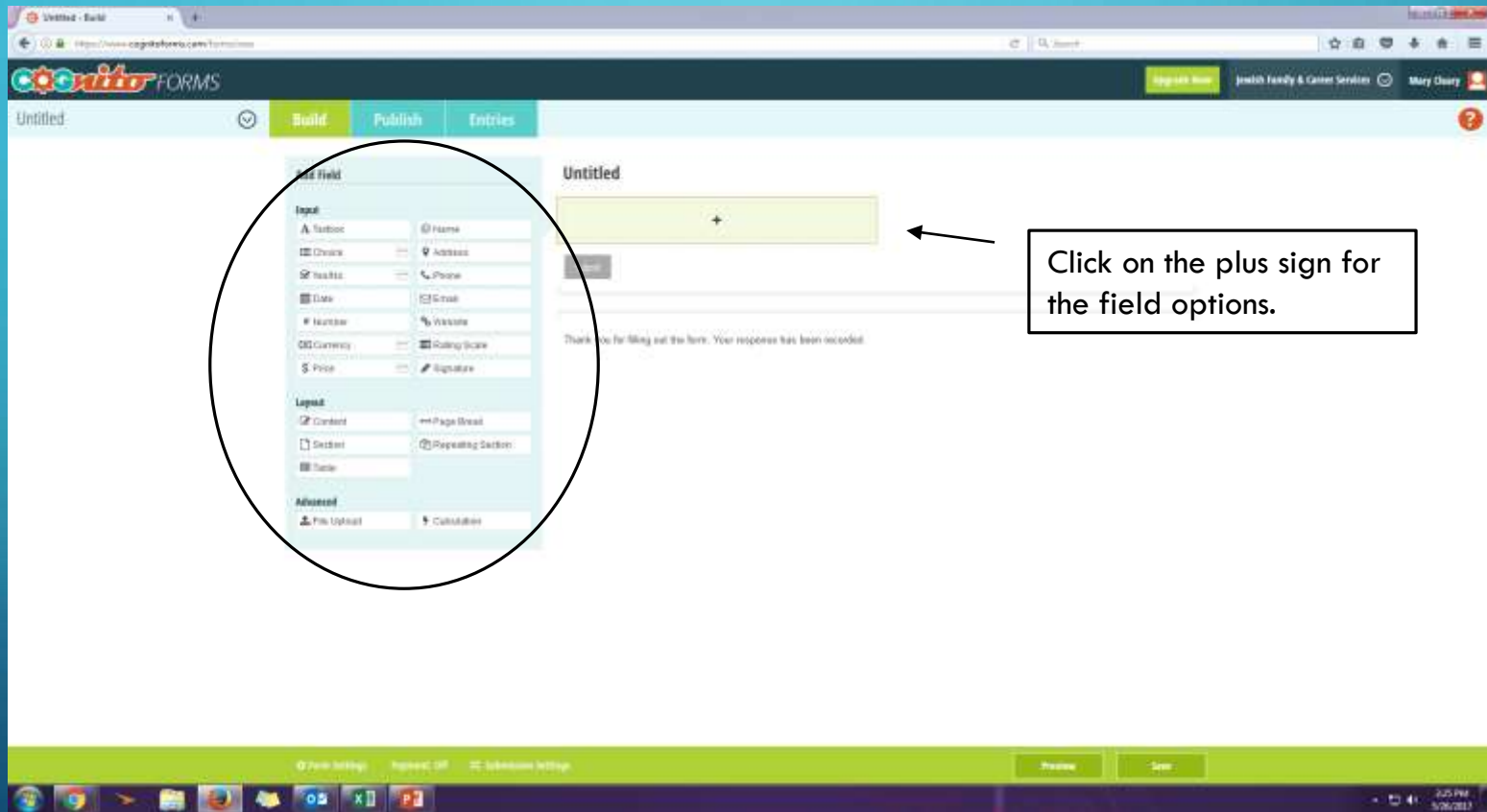
Cognito Forms is an online form building website that is user friendly, easily editable, and best of all...FREE! (There are additional pricing options with more features, but the free option meets all of our needs.)

[www.cognitoforms.com](http://www.cognitoforms.com)



- You can build your application from scratch or start with one of the free templates.
- There is a strong help/FAQ page, as well as support ticket requests and blog entries about certain features.
- Other options include JotForm, Wufoo, and Zoho. They have similar qualities to Cognito, so feel free to play around with the sites and their templates.

# BUILDING AN APPLICATION FROM SCRATCH



# BUILDING AN APPLICATION FROM SCRATCH

The screenshot displays the JotForm 'Build' interface for creating a form. The 'Field Settings - Name' panel on the left contains the following sections:

- Label:** Name
- Include:** ☐ Title, ☒ Mobile Initial, ☐ Mobile Name, ☐ Suffix
- Help Text:**
- Show This Field:** Always, When, Initially, Never
- Require This Field:** Always, When, Never
- Show Custom Error:** When, Never

An arrow points to the 'Show This Field', 'Require This Field', and 'Show Custom Error' sections, which are circled. A text box explains their utility:

These options can be very useful during the application process.

The main form area shows a 'Name' field with 'First' and 'Last' sub-fields, a 'Submit' button, and a confirmation message: 'Thank you for filling out the form. Your response has been recorded.'

The bottom of the interface includes a green bar with 'Form Settings', 'Page 1 of 1', 'Submission Settings', 'Preview', and 'Save' buttons. The Windows taskbar at the bottom shows the time as 2:38 PM on 5/26/2017.

# MAINTENANCE

- There is little to no maintenance for this kind of service. All forms are easily editable and you can save your progress as you go.
- You can arrange for Cognito to send email notifications every time you receive an application. They also maintain a database of all received forms so you can retrieve them at any time.
- Besides the actual application, you can also set up forms for just about anything. The possibilities are endless!

# BENEFITS

## User Friendly

- Clients can fill out anywhere, anytime
- Easy to edit

## Use the technology your clients use

- Screenshots, email
- Texting

## Collecting Information

- Export data to Excel
- Go paperless!

The image features a blue gradient background with white circuit-like lines in the corners. A large, empty rectangular box with a thin yellow border is centered on the page.

QUESTIONS?



## PANELIST: MAGGIE SANBORN EARN TO LEARN





## EARN TO LEARN

Envisioning a world without barriers to higher education.

### Presentation:

CFED Virtual Coffee

Using Technology to Streamline and Optimize the Application Process

# Earn to Learn Application Process

EARN TO LEARN HAS A 5 STEP APPLICATION PROCESS. WE LIST THIS ON OUR WEBSITE SO THAT APPLICANTS KNOW WHAT TO EXPECT:

- Pre-Application
  - Personal Finance Training
  - Interview Appointment
  - Income Verification
  - Enrollment Appointment
- 
- <http://earntolearn.org/our-work/program-overview-and-process/>



# Pre-Application

## PLATFORMS USED:

- SURVEY MONKEY
- OUTCOME TRACKER
- Reiterate the eligibility requirements for applicants from website
- Collect demographics and contact information from applicants
- Automatically send applicants the next steps – personal finance training and interview appointment guidelines



# Personal Finance Training

## PLATFORMS USED:

- FINANCIAL LITERACY 101 – DECISION PARTNERS
- Instructions are emailed to applicants automatically after pre-application
- Applicants are given 7 days to complete the course
- Our staff is notified immediately when course is completed



# Interview Appointment

## PLATFORMS USED:

- OUTCOME TRACKER
  - DROPBOX
  - GOOGLE DRIVE
- 
- In person or over the phone
  - Complete Earn to Learn application
    - Data used for income verification and AFI reporting
  - Collect documentation to support application
  - Provide applicants with all rules and regulations for the program





# Income Verification

## PLATFORMS USED:

- OUTCOME TRACKER
- Review application and supporting documentation
- Provide decision on application



# Enrollment Appointment

## PLATFORMS USED:

- OUTCOME TRACKER
- GOOGLE DRIVE
- Applicant becomes an official saver
- Sign a saver agreement with all rules and regulations
- Choses a financial institution to open an IDA
- Completes all needed paperwork for Earn to Learn and IDA opening



# Platforms Used

## WE USE A NUMBER OF PLATFORMS DURING THE APPLICATION PROCESS

- Earn to Learn Website
- Survey Monkey
- Outcome Tracker
  - Cost: \$6,000
- Financial Literacy 101
  - Cost: \$2,500
- Google Drive
  - General student lists generated from Outcome Tracker
  - Easier to read and to work on with multiple staff members
  - Helps us track certain list serves
- Dropbox
  - Collection of supporting documents during the application
  - Applicants often do not submit all supporting documents at once
  - Dropbox keeps Outcome Tracker cleaner and profiles accurate
  - Cost: \$ 2,847.12



# Website

## IN 2016 WE INVESTED IN A WEBSITE OVERHAUL

- As an AFI Grantee – many clients/audience
  - Funders – AFI and Universities
  - Applicants – students and families
  - Donors – individuals, corporations, businesses etc.
  - Community Partners
  - Community Businesses
- Starting point for all interest coming to Earn to Learn
- Clear direction and focus – depending on audience
- Investing in keeping website up to date



# Website

## IMPLEMENTATIONS

- Imbed the pre-application (survey monkey and outcome tracker) into the website
  - Keep applicants in one spot
- For applicants it is crucial to have clear eligibility requirements and clear program expectations
- Our website is our go to platform for everything!
- Cost: \$9,000 total discovery, set up and launch
- Upkeep: \$ + Database Manager and Marketing and Development Coordinator



# Website



# Website

## SINGLE FOCUS WEB



SINGLEFOCUSWEB.COM

CECILY URIZAR-FAUGHT

EMAIL - CECILY@SINGLEFOCUSWEB.COM



# Survey Monkey

- During our 3<sup>rd</sup> application cycle - Earn to Learn moved to using Survey Monkey in addition to Outcome Tracker because we felt limited by Outcome Tracker's abilities
- We wanted our applicants to physically have to click through our eligibility requirements – indicating that they read them – prior to beginning the application process
- Cost: \$780 per year
  - We invest in the highest level to control our landing pages, redirect pages, logos and branding, functionality of surveys and customer service

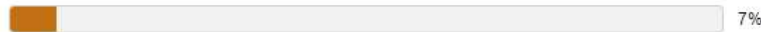




# Survey Monkey



Earn to Learn Program Pre-Application



Earn to Learn Program Pre-Application



Earn to Learn is an income and asset-based scholarship. You will need to prove your household's income and assets during your interview appointment. Our staff will walk you through this process and assist you. You can also visit our website for more information.

Press **Done** to continue.



# Survey Monkey

## BENEFITS:

- Applicants read the eligibility
  - If applicant does not meet certain requirements - Survey Monkey informs them that they are not eligible and takes them to our resource page
  - If applicant needs to talk to someone we provide contact information
  - Track where applicants exit the process
- Useful in program evaluation and surveys at later times too!



# Automation

EVERY LITTLE BIT OF SAVED TIME SAVES US MONEY AND RESOURCES!

- We have developed a few automations throughout the years.
  - Automated emails after steps are completed in the application process
  - Automatic notifications to our success coaches etc.
  - Constant Contact / Canned Emails
  - Time is important when processing applicants – so saving time anywhere we can we try to do
- 
- Applicants control how fast they go through the pipeline. From start (pre-application) to finish (IDA open and saving) can be one week.



# Lessons Learned

- Trial and error is okay
- Best practices come from testing methods and allowing for feedback
- Make the investment after testing items
  - we invested in Survey Monkey after testing its functionality
  - we invested in website designer after receiving bids
- Take the time to delve into features – taking time to learn how to save time saves money





# THANK YOU!



**Maggie Sanborn**

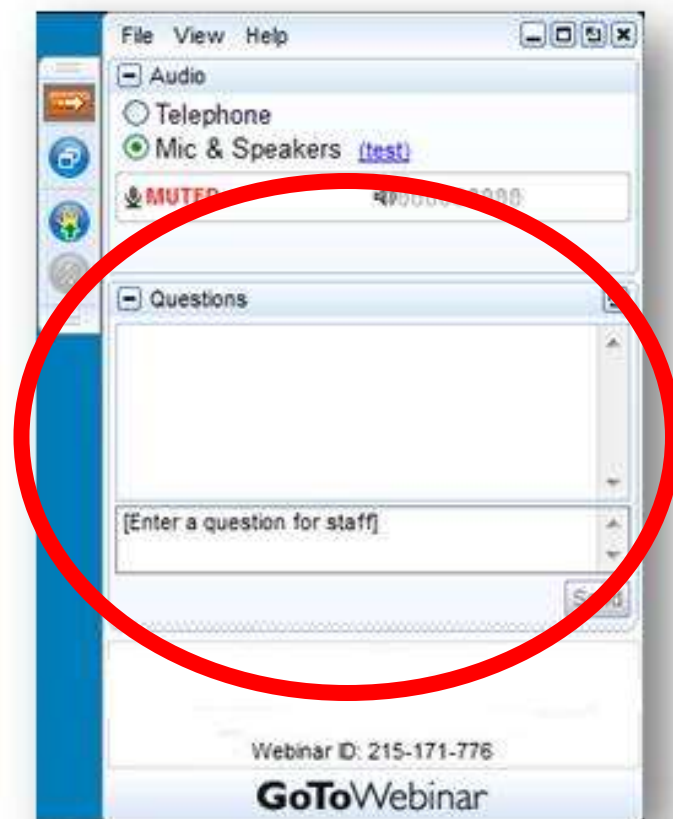
Program Director

[maggie@earntolearn.org](mailto:maggie@earntolearn.org) | 520-269-3757

[EarntoLearn.org](http://EarntoLearn.org)

## Questions?

- Ask your questions using the box on the right side of your screen





## AFI Resource Center

- Home: [idaresources.acf.hhs.gov](http://idaresources.acf.hhs.gov)
  - Calendar: <http://idaresources.acf.hhs.gov/Calendar>
- 
- Help Desk:
    - Email: [info@idaresources.org](mailto:info@idaresources.org)
    - Phone: 1-866-778-6037

Thank You!

