



The Tech-Savvy Checklist for Benefit Agencies

We all expect technology to work in certain ways. When designing client-facing web portals or mobile apps, consider how you use these tools every day to shop, send emails and texts, or check bank account balances. Keep these user expectations and best practices in mind to make the client experience on your agency's site better.

- Make sure any online service works on all available browsers — Chrome, Firefox, Safari, and Internet Explorer.
- Use navigation signals and progress bars to move through multiple screens.
- Allow your solution to use the native (built-in) features of a computer, tablet, or phone, such as using its calendar feature to schedule an appointment or using its camera to upload a document or photo.
- After an action is completed (e.g., document uploaded), provide the client with a confirmation on screen and/or in writing (e.g., confirmation email).
- Collect email addresses and mobile phone numbers as part of the normal demographic and contact information section of a form, rather than asking for that information at the end of the form or on a separate form.
- Don't make clients reset their password every month.
- Set client expectations when introducing new features or tools. For example, if a mobile app is released for the first time, explain it is a "beta version" (still being tested) so they know the app may not perform perfectly.
- Instead of relying solely on words, use commonly used icons to provide visual clues. For example, add a picture of a phone next to the agency's phone number. Even better, make it easy to click on the number to be copied or to dial automatically.
- Create an online form as a way to submit questions or comments.