CDC ReportStream Data Journey Map

Document Purpose

This journey map is designed to showcase the flow of data, during onboarding, from a sender or receiver to ReportStream, and vice-versa.

Goals

- Be a standardized, centralized journey map that displays comprehensive information about the onboarding process
- Help the team identify common user pitfalls or process slowdowns in the onboarding experience
- Identify long-term opportunities

Key and iconography

WHO'S INVOLVED

Sender · Receiver · ReportStream · Sender's customer · Receiver's customer · Other

CHANNELS & PLATFORMS

Email · Phone · Calendar · Slack · Engineering Log · Sender Onboarding · Jira · Receiver Onboarding · Postmark · Mailgun · Twilio · Logic · Pulse · Pulse.gov · Sender's guide · Sender's guide

Summary cheat sheet

There are three "testing" stages that senders have to go through to be onboarded ("go-live" in production):

1. Senders send a test file in production with the Flire Validator Tool
2. Senders test a non-PII sample file in the staging environment
3. Senders test a limited PII file in the production environment

Receivers skip Step #1, because ReportStream supplies a sample file already.

Phase | Primary Data Environment | Estimated Timeline | Step / Task | Additional Details | Materials, features, & artifacts | Opportunities

INTEREST & INTAKE

Data environment / flow channel: Email

Expected timeline: 2 weeks

Step / Task: ReportStream identifies new sender or receiver, and reaches out to potential partner | Receiver asks sender to send data to ReportStream | New user decides to onboard with ReportStream | Kickoff call between ReportStream and new user and introduce team | Create epic & tickets to support the new user | Assign criteria and/or settings and/or requirements | These may vary depending on the organization | New organization record created | New configuration is set up

Materials, features, & artifacts: Sender directory | Calendar | Engineering Log | Sender onboarding | Jira | Receiver onboarding | Postmark email | Mailgun email | Twilio | Logic | Pulse.gov | Sender's guide | Sender's guide

Opportunities:
- Proactive outreach strategies
- Streamline and modernize the intake process > leverage automation
- Enhance UX of web portal for specific users
- Self-service

ONBOARDING: ACCOUNT SETUP

Data environment / flow channel: Account Set Up & Email

Expected timeline: a few hours

Step / Task: Create account profile(s) | Send user activation email | Create account

Materials, features, & artifacts: Log-In Gov (Okta, phone) | Log-In Gov (Okta, phone) | Log-In Gov (Okta, phone)

Opportunities:
- Leverage automated enrollment and notifications
- Update documentation

ONBOARDING: TESTING MESSAGE

Data environment / flow channel: ReportStream Website

Expected Timeline: 2 days- 1week

Note: Every step authorization may occur any time through the Testing Message phase, but most occur prior to the next phase, Testing in Staging.

SENDER JOURNEY

Sender activates an account with a sample file (non-PII) | Sender has messages to be in-put through the system, and sends to a staging endpoint | Sample file (PII data) with pass validation and flags errors | Feedback is provided to adjust sender settings | Sender has the ability to successfully send messages without errors | Sample file (PII data) with fail validation and flags errors | Feedback is provided to adjust sender settings | Sender has the ability to successfully send messages without errors

Materials, features, & artifacts: Engineering Log | Flire Validator | Engineering Log | Engineering Log | Engineering Log | Engineering Log | Engineering Log

Opportunities:
- Leverage automated tracking of testing progress
- Improve error messaging with helper text / remediation strategies
- Improve documentation and how-to guides for self-service debugging

ONBOARDING: PUBLIC KEY AUTHENTICATION

Data environment / flow channel: ReportStream Website

Expected Timeline: a few hours

Note: Every step authorization may occur any time through the Testing Message phase, but most occur prior to the next phase, Testing in Staging.

Step / Task: Create public-private key pair | Share public key for staging and production environments | Generate public key and sender settings for staging and a production

Materials, features, & artifacts: Flire Validator | Flire Validator

Opportunities:
- Create additional confirmations to verify success
- Update user guide

ONBOARDING: TESTING IN STAGING

Data environment / flow channel: ReportStream Staging Environment

Expected Timeline: 2 - 4 weeks

Step / Task: Receiver is provided with a sample file to test in staging | Sample file (PII data) with pass validation within the staging environment | Receiver is provided with a sample file to test in staging | Sample file (PII data) with fail validation within the staging environment | Receiver is provided with a sample file to test in staging | Sample file (PII data) successfully passes through the staging environment

Materials, features, & artifacts: Engineering Log | Engineering Log | Engineering Log | Engineering Log | Engineering Log | Engineering Log

Opportunities:
- Leverage automated tracking of testing progress
- Improve error messaging with helper text / remediation strategies
- Improve documentation and how-to guides for self-service debugging

RECEIVER JOURNEY

Receiver has a sample file (non-PII) and is provided with a sample file | Receiver's customer receives sample messages from the sender's customer | Sample file (PII data) with pass validation from Receiver | Feedback is provided to adjust routing settings | The ReportStream receiver is provided with a sample message in a test environment | Sample file (PII data) successfully passes through the receiver's system

Materials, features, & artifacts: Receiver's customer | Receiver's customer | Receiver's customer | Receiver's customer | Receiver's customer | Receiver's customer

Opportunities:
- Leverage automated tracking of testing progress
- Improve error messaging with helper text / remediation strategies
- Improve documentation and how-to guides for self-service debugging

ONBOARDING: TESTING IN PRODUCTION

Data environment / flow channel: ReportStream Production Environment

Expected Timeline: 2 - 4 weeks

Step / Task: Receiver is provided with a sample file to test in production | Sample file (PII data) with pass validation within the staging environment | Receiver is provided with a sample file to test in production | Sample file (PII data) with fail validation within the production environment | Receiver is provided with a sample file to test in production | Sample file (PII data) successfully passes through the production environment

Materials, features, & artifacts: Engineering Log | Engineering Log | Engineering Log | Engineering Log | Engineering Log | Engineering Log

Opportunities:
- Leverage automated tracking of testing progress
- Improve error messaging with helper text / remediation strategies
- Improve documentation and how-to guides for self-service debugging

GO-LIVE

Data environment / flow channel: ReportStream and User's Production Environment

Expected Timeline: 1 week

Step / Task: Schedule go-live date with user | Go Live: Start data flow to receiver | Announce that the user is now live

Materials, features, & artifacts: Calendar | Slack | Slack

Opportunities:
- Leverage automated notifications and tracker to update user list
- Create additional confirmations to verify success

MAINTENANCE

Data environment / flow channel: ReportStream Production Environment

Expected Timeline: ongoing

Step / Task: Data flow is monitored for quality and errors, and fixes are made as needed | Create tickets in Jira for engineers to address issues that arise | Communicate issues to user | Engineers fix bug or flaw/adjust sender settings to address issues in their system | Data flow continues to be monitored

Materials, features, & artifacts: Jira | Jira | Jira | Jira | Jira | Jira | Jira

Opportunities:
- Create centralized dashboard for monitoring data flow
- Develop advanced monitoring tools for detecting abnormalities in data flow