

# WORKING WITH PII

## WBT Concept & Storyboard

*Personally Identifiable Information*



iSPRING BASED COMPLIANCE TRAINING WBT

*Concept and Storyboard*



ANALYZE



DESIGN



DEVELOP

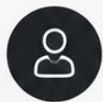


IMPLEMENT



EVALUATE

ADDIE FRAMEWORK



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# Course Concept

## Purpose

Transform policy-based PII guidance into practical WBT experiences that teach learners how to recognize, protect, and share Personally Identifiable Information safely within role-specific guidelines. The first course was created for SNAP Navigators. A second course was later developed for County Social Service Agencies after policy changes and updated directives required a more targeted treatment of PII disclosure responsibilities.

|                              |                                                                                                                                                     |
|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Primary Outputs</b>       | Two separate audience-specific PII courses, short section knowledge checks, module reviews, and QRC takeaways.                                      |
| <b>Original Source Input</b> | Approximately 20 pages of source materials were reviewed, synthesized, and organized into an outline for SME review and approval.                   |
| <b>Delivery</b>              | Self-paced iSpring WBT development using PowerPoint first design, concise sections, quiz interactions, answer feedback, and review slides.          |
| <b>Central Learning Need</b> | Learners must recognize PII, protect it during client service work, and share it only according to approved policy and legal boundaries.            |
| <b>Portfolio Value</b>       | Demonstrates instructional analysis, audience differentiation, content reuse, assessment design, WBT development, and performance support planning. |

## Design Framework

| ANALYZE                                                          | ORGANIZE                                                                                   | BUILD                                                                         | SUPPORT                                                                                                         |
|------------------------------------------------------------------|--------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| Clarify the policy, audience, risk, and learner decision points. | Turn dense source material into a clear outline, two module structure, and SME ready plan. | Create the WBT screens, section checks, review content, and learner feedback. | Provide QRCs and post-training reference materials to help learners apply the training after course completion. |

# Instructional Design Process Map

The visual below provides an at a glance view of my ADDIE aligned workflow for analyzing source content, organizing instruction, building WBT modules, and supporting learner application.

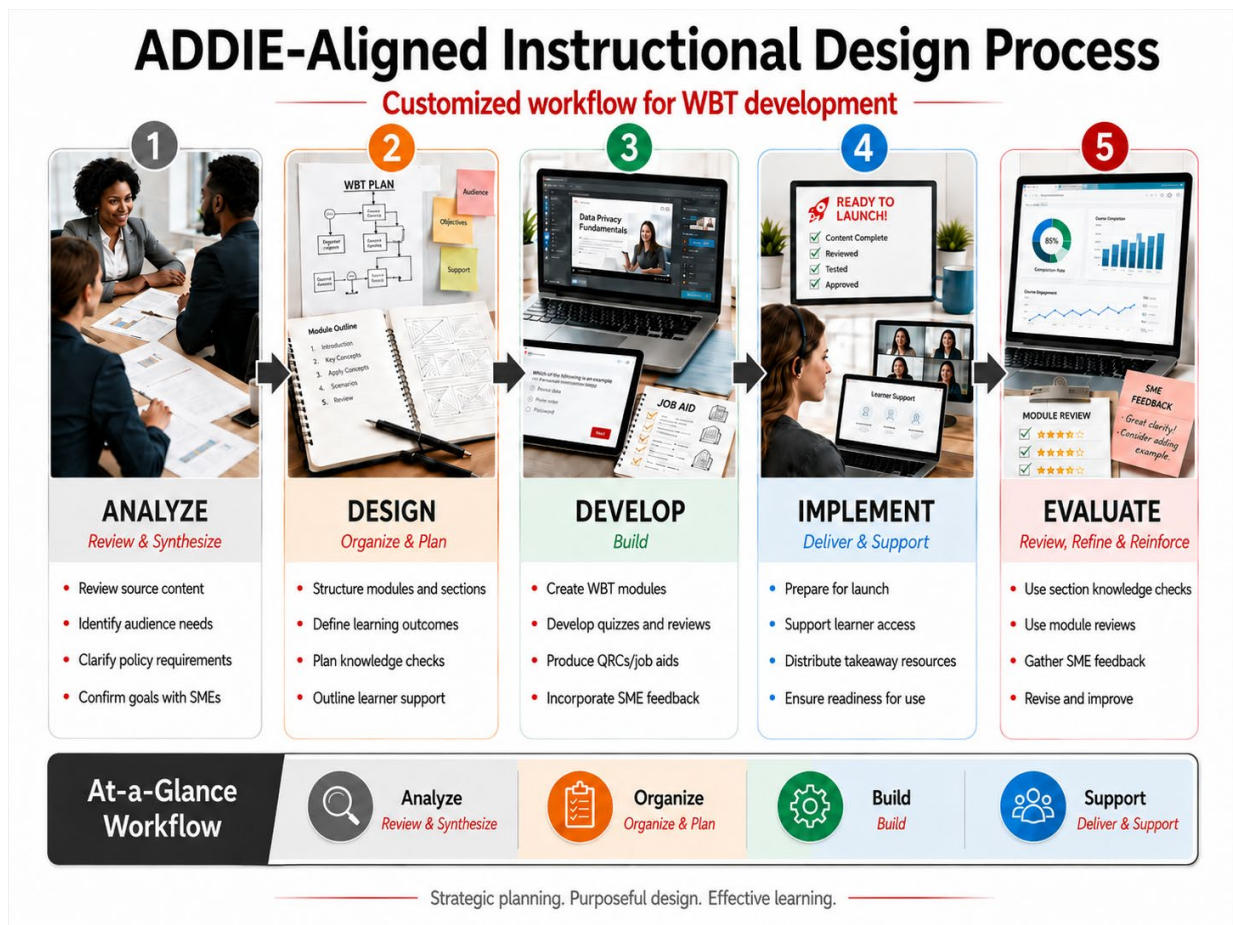


Figure 1. ADDIE aligned process map showing how source review, SME input, audience needs, WBT development, knowledge checks, and learner support resources are translated into a structured eLearning solution.

# Project Evolution and Learner Experience

## Course Adaptation Sequence

The PII training did not begin as one simultaneous two audience build. It evolved in phases. First, the SNAP Navigator course was developed with a primary focus on protecting PII while supporting individuals and families through SNAP related services. Months later, after policy changes and updated directives, a second course was developed for County Social Service Agencies.

The County Social Service Agencies course reused applicable content from the SNAP Navigator course, then added the disclosure guidance needed for agency staff. This allowed the second course to stay efficient while addressing a different learner responsibility: protecting PII and sharing it only under approved program, policy, and legal boundaries.

|                                                 |                                                                                                                                                                                                                                       |
|-------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Course 1: SNAP Navigators</b>                | Focused primarily on recognizing and protecting PII during eligibility screening, application assistance, document gathering, and benefit maintenance support.                                                                        |
| <b>Course 2: County Social Service Agencies</b> | Added the component of not only protecting PII but also lawfully sharing PII within specific program, policy, and legal boundaries.                                                                                                   |
| <b>Design Benefit</b>                           | The second course did not require a complete rebuild from scratch. Reusable content was retained where appropriate, and new or revised County Social Service Agencies specific content was developed only where the role required it. |

# Learner Experience Map

|   |                                                                  |                                                                                                                                                                                      |
|---|------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | <b>ANALYZE</b><br>Source review + audience needs                 | Reviewed approximately 20 pages of PII source material, identified audience responsibilities, and confirmed where SNAP Navigator and County Social Service Agencies' needs differed. |
| 2 | <b>ORGANIZE</b><br>Outline + SME review                          | Synthesized dense policy content into a learner ready outline for SME review before development.                                                                                     |
| 3 | <b>BUILD</b><br>WBT sections + checks                            | Developed iSpring WBT sections, short knowledge checks, answer feedback, and separate module review sections.                                                                        |
| 4 | <b>SUPPORT</b><br>QRCs + transfer                                | Created QRC takeaways so learners could apply key points after training and return to policy aligned reminders.                                                                      |
| 5 | <b>ADAPT</b><br>Second course for County Social Service Agencies | Repurposed applicable SNAP Navigator content and developed new County Social Service Agencies specific content focused on lawful PII sharing within strict boundaries.               |

# ADDIE Aligned Design Approach

The work follows ADDIE while using a practical production workflow: Analyze, Organize, Build, and Support. This keeps the design process clear, but flexible enough for real project timelines.

| ADDIE Phase | Project Application                                                                                                                                                                                |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Analyze     | Reviewed source materials, identified audience responsibilities, clarified policy requirements, and determined where the SNAP Navigator and County Social Service Agency courses needed to differ. |
| Design      | Organized the content into two primary modules, section level topics, knowledge checks, review sections, and learner support resources.                                                            |
| Develop     | Built the WBT content, quiz interactions, answer feedback, and QRC takeaways using iSpring and PowerPoint first design.                                                                            |
| Implement   | Prepared WBT content for deployment through LMS ready or web-based delivery and supported learner access to QRC resources after training.                                                          |
| Evaluate    | Used section level knowledge checks, module reviews, SME feedback, and learner performance patterns to support reinforcement and future revisions.                                                 |

## Key Design Decisions

- Create two separate courses rather than forcing one course to serve two audiences with different responsibilities.
- Use the original SNAP Navigator course as a foundation for the County Social Service Agencies version where content remained relevant.
- Build only the new or revised content needed to address County Social Service Agency specific disclosure responsibilities.
- Use short section knowledge checks to reinforce learning immediately after each topic.
- Include separate module review sections for Module 1 and Module 2.
- Provide QRC takeaways after training so learners could reference the key points later.

# Two Module WBT Architecture

The course was organized into two primary modules with 12 total sections, including a separate review section for each module. This portfolio version summarizes the architecture at the component level so the design logic is clear without exposing unnecessary course details.

## Course Architecture at a Glance

| Course Component                        | Purpose                                                                                                                                     |
|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| Pre-Knowledge Check                     | Assess learner baseline before instruction begins.                                                                                          |
| Module 1 What Is PII and Protecting PII | Teach learners to recognize PII, identify common examples, reduce risk, and protect sensitive client information during role specific work. |
| Module 1 Review                         | Reinforce Module 1 before learners move into disclosure guidance.                                                                           |
| Module 2 PII Disclosure Guidelines      | Teach when and how PII may be shared according to approved policy, role responsibilities, disclosure rules, and escalation expectations.    |
| Module 2 Review                         | Reinforce Module 2, including policy based sharing decisions and disclosure boundaries.                                                     |
| Post Knowledge Check                    | Measure understanding after training and reinforce core expectations.                                                                       |
| QRC Takeaway                            | Provide concise reminders learners can reference after course completion.                                                                   |

# Learning Outcomes and Audience Application

## Learning Outcomes

- Define Personally Identifiable Information in the context of SNAP and social services work.
- Recognize PII in documents, conversations, systems, forms, communications, and linked or linkable sources.
- Apply safeguards for protecting PII during client service, application support, intake, assessment, and program administration.
- Identify how PII may be shared intentionally or inadvertently and reduce common risk points.
- Distinguish between general protection responsibilities and the specific disclosure guidelines that govern County Social Service Agencies information sharing.
- Use QRCs and job aids after training to reinforce the actions, reminders, and policy aligned decisions covered in the WBT.

## Audience Specific Application

| Focus Area       | SNAP Navigator Course                                                                                               | County Social Service Agencies Course                                                                                                                       |
|------------------|---------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Recognizing PII  | Identify PII in client documents, eligibility screening, application support, and benefit maintenance interactions. | Identify PII in intake, application assessment, case related systems, and program administration.                                                           |
| Protecting PII   | Safeguard client information during document gathering, communications, and support services.                       | Safeguard client information during agency processes, case review, and benefit related work.                                                                |
| Sharing PII      | Reinforce when information should not be shared or should be escalated for guidance.                                | Apply policy based disclosure rules for approved sharing with authorized disclosure requests, hearings, interagency coordination, and verification systems. |
| Role Application | Use SNAP Navigator examples connected to client assistance and benefit maintenance.                                 | Use County Social Service Agencies examples connected to intake, eligibility assessment, program integrity, and cross system consistency.                   |

# Assessment Strategy

## Knowledge Checks and Module Reviews

Each instructional section included a short two to four question knowledge check. The checks were used to reinforce the most important concepts immediately after instruction and to help learners apply the content in the context of their role.

The course also included two separate module review sections. Module 1 review reinforced What is PII and Protecting PII. Module 2 review reinforced PII disclosure and sharing according to policy.

|                                                                                                                                                |                                                                                                                           |
|------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| <b>Pre-Knowledge Check</b><br>Assesses baseline understanding before instruction and surfaces prior knowledge or misconceptions.               | <b>Section Knowledge Checks</b><br>Two to four questions after each instructional section to reinforce the related topic. |
| <b>Module 1 Review</b><br>Separate review section focused on What is PII and Protecting PII. No knowledge check for the review section itself. | <b>Module 2 Review</b><br>Separate review section focused on PII disclosure guidelines and policy based sharing.          |
| <b>Post Knowledge Check</b><br>Measures retained understanding after training and reinforces core expectations.                                | <b>Feedback</b><br>Learners receive answer feedback to reinforce correct decisions and clarify misunderstandings.         |

## Sample Assessment Focus Areas

- Identify examples of PII and distinguish linked or linkable information.
- Recognize ways PII may be shared intentionally or inadvertently.
- Choose appropriate safeguards for working with client information.
- Identify steps for reporting a suspected data breach.
- Apply County Social Service Agencies disclosure guidelines when information may be shared under policy or legal authority.

# Storyboard and Development Approach

## Project Treatment Decision

This project is presented as an instructional design planning and process sample. It shows how source review, SME review, approved outlines, WBT development, knowledge checks, module reviews, and QRC takeaways can work together without requiring a highly graphic storyboard for every project.

| Development Element | Purpose                                                                       | Treatment                                                                                                       |
|---------------------|-------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| Source Review       | Understand the policy content, required topics, and learner responsibilities. | Reviewed approximately 20 pages of source material and identified essential instructional content.              |
| SME Ready Outline   | Create a clear structure for review and approval before build.                | Converted source content into a course outline organized by modules, sections, and key decisions.               |
| WBT Build           | Develop the approved outline into a learner ready course.                     | Built the course in iSpring using instructional screens, knowledge checks, answer feedback, and module reviews. |
| Assessment Build    | Create checks that reinforce and measure understanding.                       | Developed pre- and post-checks, section checks, and module review treatments.                                   |
| QRC Takeaways       | Support application after training.                                           | Created QRCs to reinforce key points and provide post-training reminders.                                       |

## Content Reuse Decision

For the County Social Service Agencies course, reusable SNAP Navigator content was retained where the policy and learner need remained the same. New content was added where agency responsibilities required stronger treatment of disclosure rules, authorized program integrity requests, hearings, interagency coordination, and verification systems.

# QRC and Performance Support Strategy

QRCs were developed as post training support so learners could return to the most important reminders after the WBT. The SNAP Navigator QRC includes key points from both modules, and the same approach can be adapted for County Social Service Agencies with role specific disclosure reminders and policy based examples.

- Use simple, scannable wording that supports quick application on the job.
- Focus on decisions learners must make, not long policy explanations.
- Reinforce the same language and key points used in the WBT.
- Provide takeaways by email so all attendees have access after training.
- Adjust County Social Service Agencies versions to address policy based disclosure, authorized program integrity requests, hearings, other government agencies, and cross system verification needs.

# What This Work Sample Demonstrates

|                               |                                                                                                            |                                     |                                                                                                                |
|-------------------------------|------------------------------------------------------------------------------------------------------------|-------------------------------------|----------------------------------------------------------------------------------------------------------------|
| <b>Content Analysis</b>       | Synthesizes dense policy content into a learner focused structure.                                         | <b>Audience Differentiation</b>     | Creates separate course treatments for SNAP Navigators and County Social Service Agencies.                     |
| <b>ADDIE Aligned Design</b>   | Applies analysis, design, development, implementation planning, and evaluation thinking.                   | <b>Content Reuse and Adaptation</b> | Repurposes applicable content while building only the County Social Service Agencies specific material needed. |
| <b>Assessment Development</b> | Uses pre/post checks, section knowledge checks, and module reviews to reinforce and measure understanding. | <b>eLearning Development</b>        | Builds iSpring WBT content with interactions, feedback, navigation, and review structure.                      |
| <b>SME Collaboration</b>      | Uses outline review and approval before development to reduce rework and confirm accuracy.                 | <b>Performance Support</b>          | Provides QRC takeaways to support post training application and learner reference needs.                       |