

US Census Partner Portal

UX/UI Design Case Study

What is the Census Partner Portal?

- A one-stop shop for the Census Bureau to connect, communicate and engage with the participants of various geographic programs.
- A communication platform for the Census partners to send/receive any correspondence and to post any program notifications and announcements.
- A secured portal for external partners at tribal, state, and local governments to access entity-specific partnership program information, including geospatial data, historical program participation information, and contact updates

Purpose of Partner Portal

- Build knowledge, manage opportunities, create demand marketing, influence behavior, apply to the partner program, and assist buyers. Each area addressing these functions contains basic, intermediate, and advanced features, as well as individualized content for every partner
- A partner portal is similar to a customer self-service portal, in that it allows partners to help themselves

Research Findings

Common Features

- Dashboard with Activity Updates
- Communication Tools: email, real-time chatting, messaging
- Self Help Features (knowledge articles, self-training materials)
- File download/upload
- Analytical tools and reports
- Security/user login (single sign on)
- App integrations: access other application data

Measures for a Successful Partner Portal

- Three pillars of a successful portal: the platform, the content, and the support
 - Platform: the physical site: what it looks like and how it acts
 - Content: what the partners can access and interact with on the portal
 - Support: Robust partner support mechanisms
 -

What Partners Look for in Partner Portal

- Ease of Use: An easy-to-use, mobile-friendly partner portal is essential for partner success
- Effective Content Organization: makes most visited sections highly accessible and easy to use
- Feedback Center: give partners an opportunity to communicate openly

Who are the Census Partner Portal Users

Government Entities

- State Government Entities
- County Government Entities
- Tribal Entities
- Minor Civil Division

Universities and Research Institutions

Regional Agencies

General Public: Includes Individuals and Private Sectors

Census Staff

Three Access and Design Types

External Partner User (Government Entities) Access: Login required

Internal Census User (Census Staff) Access: Login required

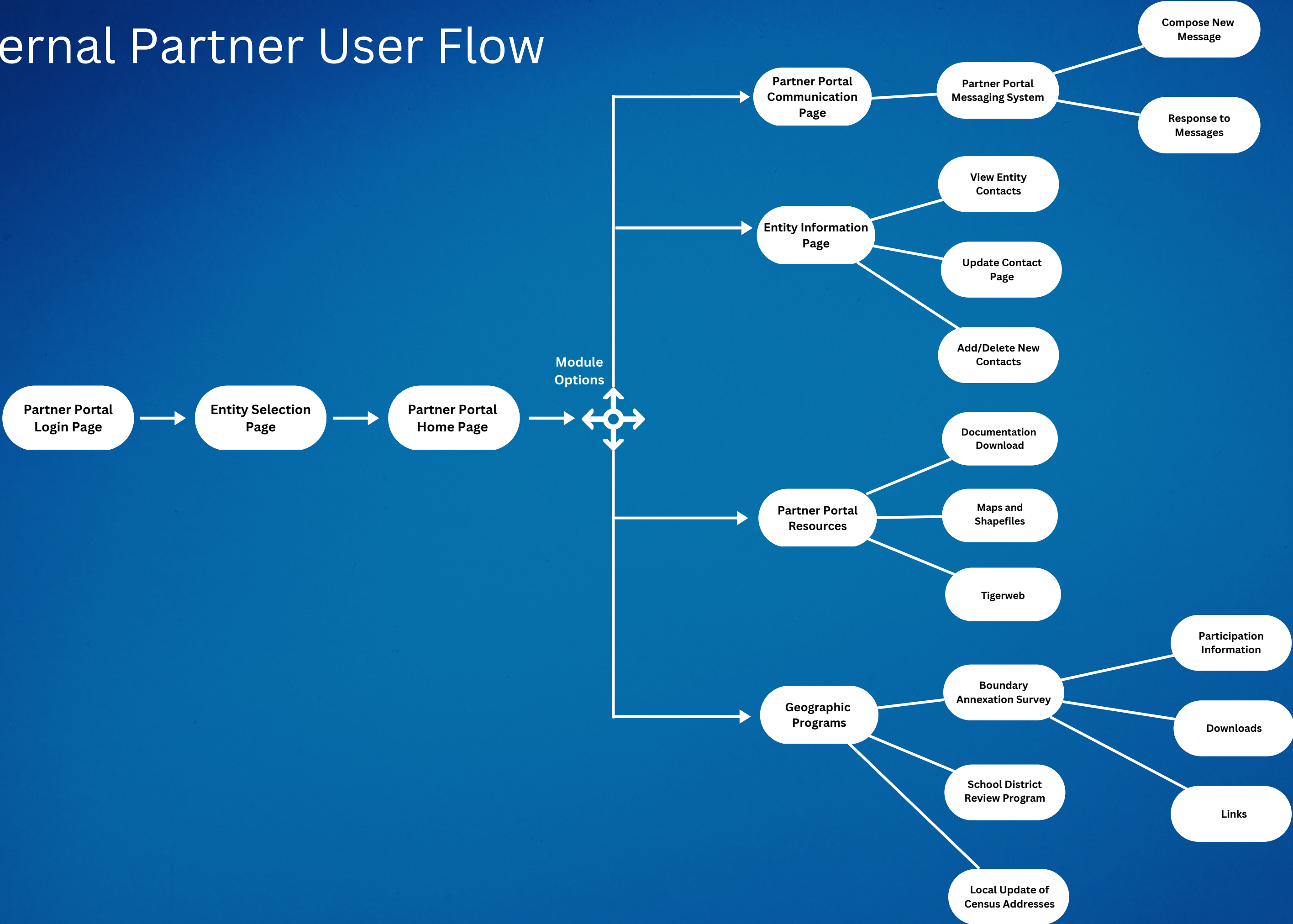
Public Access (Other Users): No Login



References For Design

- Zendesk
- Zoho
- Salesforce
- Jira

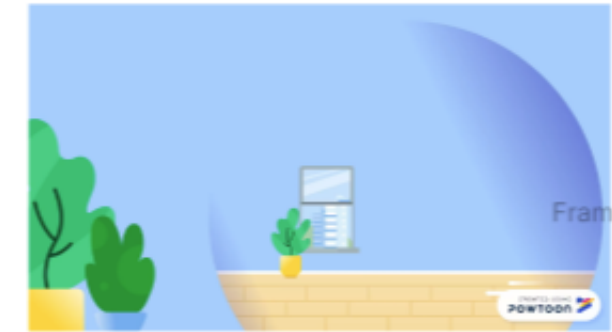
External Partner User Flow



LOGIN PAGE

Welcome to the GEO Partner Portal!

The Partner Portal is, where tribal, state, and local governments can receive customized and controlled access to Census Bureau geographic and statistical information unique to their government; as well as enable them to update contact information, receive and respond to program invitations, download data and products, securely upload and update authoritative geographic data (addresses, features, boundaries, and geographic reference data), view historical participation information, and correspond with Census Bureau officials regarding their community.



Log in

Public

Frequently Asked Questions

Have questions? We're here to help.

Help writing a message



Where can I upload documents?



How do I perform a search?



How do I search for a specific Entity?



New Updates

Have questions? We're here to help.

Updates to User Agreement



New GEO Programs download function.








Federal Holiday Next Week



Entity Search now faster than ever!



HOME PAGE

 Partner Portal    


John Smith
Log Out


Washington D.C

ID: PL1150000 BAS ID: 11100050000 Population Est: 12,345 Housing: 12,345

Communication Summary

[All 10](#) [New 2](#) [Unopened 6](#) [Important 2](#)

 **Updates from the boundary surveys taken last year.**
01/20/2022 From: John Doe To: LUCA, BAS

 **New changes to the Partner Portal**
05/28/2022 From: Jane Doe To: John Smith

Contacts

Name	Position	Email	Phone Number
John Doe	Chief Officer	johndoe@census.gov	305-454-1192
John Doe	Chief Officer	johndoe@census.gov	305-454-1192
John Doe	Chief Officer	johndoe@census.gov	305-454-1192
John Doe	Chief Officer	johndoe@census.gov	305-454-1192
John Doe	Chief Officer	johndoe@census.gov	305-454-1192

Geo Program Status

Program	Registered	Submitted Changes	Feedback
BAS	Yes	11/04/2020	None
SDRP	Yes	12/04/2019	
LUCA	Yes	09/08/2021	
New Construction	No	05/02/2022	

Important Announcements/Reminders


Updated User Terms [↗](#) 12/23/2022


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New GEO Programs download function. [↗](#) 12/24/2022

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Donec dapibus nibh magna, in vulputate quam rhoncus a. Mauris sit amet commodo felis

Frequently Asked Questions Update [↗](#) 11/24/2022





Contact Information Page

Washington D.C ▾
ID: PL1150000 BAS ID: 11100050000 Population Est: 12,345 Housing: 12,345






Organizational Contacts **Program Contacts**


Contacts	Programs
<p>Smith, Brian Email: bsmith@yahoo.com Phone: 655-122-12929</p> <p>Associated Programs: Boundary and Annexation Survey 2020 New Construction 2023 School District Redistricting Program</p>	<p>BAS T023</p> <p>BAS22</p> <p>CQR20</p> <p>LLSN</p> <p>NC20</p> <p>PPO20</p> <p>PUMA20</p> <p>SD23</p> <p>MC23</p> <p>T123</p> <p>CLEAR</p>
<p>Jones, Logan Email: ljones@yahoo.com Phone: 665-122-12929</p> <p>Associated Programs: Boundary and Annexation Survey 2020 New Construction Program</p>	
<p>Lacey, Whitney Email: wlacey@yahoo.com Phone: 765-843-12929</p> <p>Associated Programs: Boundary and Annexation Survey 2020 New Construction Program</p>	

Add New

CONTACT
INFO PAGE






COMMUNICATION PAGE

 Partner Portal    

Washington D.C 


ID: PL1150000 BAS ID:11100050000 Population Est: 12,345 Housing: 12,345

Threads

To	From	Subject	Date	Category	Important
	 John doe	Perfect thank you so much. I have another question about the portal as well.	01/21/2021 03:07:54		
	 John doe	Perfect thank you so much. I have another question about the portal as well.	01/21/2021 03:07:54		
	 John doe	Perfect thank you so much. I have another question about the portal as well.	01/21/2021 03:07:54		
	 John doe	Perfect thank you so much. I have another question about the portal as well.	01/21/2021 03:07:54		
	 John doe	Perfect thank you so much. I have another question about the portal as well.	01/21/2021 03:07:54		

Messages [REPLY](#) [NEW MESSAGE](#)


Unable to find documents related to LUCA

 John Doe 01/21/2021 03:07:54

Hi Sam,

I am facing a problem as I can not find the specific LUCA documents we talked about yesterday. If you have some time today please let me know so I can fill those out asap.


Thank you, John

 Sam Diaz 01/21/2021 03:08:24

Hi John,

I apologize, I thought I had sent that out to you yesterday. Let me try sending it again and see if it works fine this time.

-Sam

 John Doe 01/21/2021 03:10:20

Hi Sam,

Thank you for your response.

GEO PROGRAMS PAGE

Partner Portal

Washington D.C. ▼
ID: PL1150000 BAS ID:11100050000 Population Est: 12,345 Housing: 12,345

GEO STATUS BAS LUCA SDRP

GEO PROGRAMS

Geographic Program Status

Welcome to the GEO Programs module. Below you will find, within each program container, the participation numbers and submitted numbers of each individual Geographic program as well as any updates pertaining to them. You can click on the modules to expand the view of each Geo Program.

BAS

Legend: Participation Number (grey), Submitted Number (blue)

Updates:
orem ipsum dolor sit amet, consectetur adipiscing elit. Aenean porttitor vestibulum lacus sit amet tincidunt. Quisque vehicula urna quis dolor iaculis fringilla. Nulla sodales ultricies nisi non

LUCA

Legend: Participation Number (light green), Submitted Number (dark green)

Updates:
orem ipsum dolor sit amet, consectetur adipiscing elit. Aenean porttitor vestibulum lacus sit amet tincidunt. Quisque vehicula urna quis dolor iaculis fringilla. Nulla sodales ultricies nisi non

SDRP

Legend: Participation Number (blue), Submitted Number (light blue)

Updates:
orem ipsum dolor sit amet, consectetur adipiscing elit. Aenean porttitor vestibulum lacus sit amet tincidunt. Quisque vehicula urna quis dolor iaculis fringilla. Nulla sodales ultricies nisi non

Program	Registered	Submitted Changes	Feedback
BAS	Yes	11/04/2020	None
SDRP	Yes	12/04/2019	
LUCA	Yes	09/08/2021	
New Construction	No	05/02/2022	

LOGIN PAGE

Partner Portal

Washington D.C.
 ID: PL1150000 BAS ID:11100050000 Population Est: 12,345 Housing: 12,345

Staff Review

Existing Details

Contact Details			
Title	First Name	Middle Initial	Last Name
Mr.	Zeb	A	Dickey
Name Suffix	Professional Suffix	Department Name	
	GISP	Engineering	
Position	Is this elected Position?	Term Expiration Date	
Assistant Engineer	<input type="radio"/> Yes <input checked="" type="radio"/> No		

Mailing Address (PO Box or City Style)		
Street Address	City	
45 Court Ave	Chatom	
State	ZIP Code	ZIP +4
Alabama	36518	

Physical Address		
Street Address	City	
State	ZIP Code	ZIP +4

Phone and Email Address		
Phone Number	EXT	Alternate Phone Number
896-885-4585		
Alternate EXT	Email Address	
	zdickey@gwalabama.com	

Organizations and Programs

Organizational Contacts

HEO TC ARAP FSC GATC NSGIC SDC

SCO

Program Contacts

BAS BAS22 CQR20 LLSN NC20 PPO20 PUMA20

SD23 MC23 T123 TO23

Updated Details

Contact Details			
Title	First Name	Middle Initial	Last Name
Mr.	Zeb	J	Dickey
Name Suffix	Professional Suffix	Department Name	
	GISP	Engineering	
Position	Is this elected Position?	Term Expiration Date	
Principal Engineer	<input type="radio"/> Yes <input checked="" type="radio"/> No		

Mailing Address (PO Box or City Style)		
Street Address	City	
45 Court Ave	Chatom	
State	ZIP Code	ZIP +4
Alabama	36518	

Physical Address		
Street Address	City	
45 Court Ave	Chatom	
State	ZIP Code	ZIP +4
Alabama	36518	

Phone and Email Address		
Phone Number	EXT	Alternate Phone Number
896-885-4585		
Alternate EXT	Email Address	
	zdickey@gwalabama.com	

Organizations and Programs

Organizational Contacts

HEO TC ARAP FSC GATC NSGIC SDC

SCO

Program Contacts

BAS BAS22 CQR20 LLSN NC20 PPO20 PUMA20

SD23 MC23 T123 TO23

Comments

Updated Notes

Just wanted to update some fields for position and also fill out the empty fields in physical address.

ADD A NEW CONTACT PAGE

Partner Portal

Washington D.C.
 ID: PL1150000 BAS ID:11100050000 Population Est: 12,345 Housing: 12,345

Add New Contact

Contact Details

Title	First Name *	Middle Initial	Last Name *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name Suffix	Professional Suffix	Department Name	Position *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Is this elected Position? <input type="radio"/> Yes <input type="radio"/> No	Term Expiration Date		
	<input type="text"/>		

Mailing Address (PO Box or City Style)

Street Address	City *	State *
<input type="text"/>	<input type="text"/>	<input type="text"/>
ZIP Code *	ZIP +4	
<input type="text"/>	<input type="text"/>	
<small>Must be 5 digits</small>		

Physical Address

Street Address	City *	State *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Zipcode	Zip+4	
<input type="text"/>	<input type="text"/>	
<small>Must be 5 digits</small>		

Phone and Email Address

Phone Number *	EXT	Alternate Phone Number	Alternate EXT
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<small>Must be 10 digits</small>		<small>Must be 10 digits</small>	
Email Address *			
<input type="text"/>			
<small>Must contain @</small>			

Organizations and Programs

Organizational Contacts

HEG	TC	CCL	FSC	GATC	NSG	NSG	SDC	SCO
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Program Contacts

BAS	BAS22	CQR20	LLSN	NC2020	PPO2020	PUMA20	SD21	SD22
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Comments

Write any comments here pertaining to this Entities organizational or program relationships... (Required)

BOUNDARY AND ANNEXATION SURVEY PAGE

Partner Portal

Washington D.C
ID: PL1150000 BAS ID:11100050000 Population Est: 12,345 Housing: 12,345

GEO STATUS **BAS**

Boundary and Annexation Survey

BAS Contact: Mr. John Smith
2023 BAS Response: Responded with no changes

The Boundary and Annexation Survey (BAS) provides tribal, state, and local governments an opportunity to review the Census Bureau's legal boundary data to ensure the Census Bureau has the correct boundary, name, and status information. BAS also allows participants to review and provide updates to census designated places...

[Read More...](#)

Response Information

- Respond to BAS**
Complete the Boundary and Annexation Survey (BAS) Annual Response Form.
- BAS Participation and Response**
Maps showing Boundary and Annexation Survey (BAS) participation and response information.
- BAS Schedules**
Important dates to know for the Boundary and Annexation Survey (BAS).

Submission

- BAS Partnership Toolbox**
Create changes using the BAS Partnership Toolbox for ArcGIS Desktop or ArcGIS Pro.
- Geographic Update Partnership Software**
A customized GIS software provided by the Census Bureau based on the open-source platform QGIS. GUPS is tailored to meet the needs of participants without extensive GIS experience.
- How-to Guides**
How-to guides for the different response methods for the Boundary and Annexation Survey (BAS).

Reference Tools

- 2023 BAS Maps**
The 2023 Boundary and Annexation Survey (BAS) maps display legal boundaries and names for all governments, as reported through the 2022 BAS.
- 2023 BAS Partnership Shapefiles**
Download the 2023 BAS partnership shapefiles to review and update your boundaries.
- TIGERweb**
How-to guides for the different response methods for the Boundary and Annexation Survey (BAS).

Additional Resources

- BAS Videos**
This collection of videos provides an overview of the BAS and information needed to get started with a program submission.
- BAS Agreements**
Boundary and Annexation Survey (BAS) Agreements help coordinate information sharing between state and county governments and the Census Bureau.

Tools

- Software**
Download extraction tools to help you get the in-depth data you need.
- Data Tools and Apps**
Find information using interactive applications to get statistics from multiple surveys.
- Public Sector**
The U.S. Census Bureau provides data for the Federal, state and local governments as well as voting, redistricting, apportionment and congressional affairs.

Downloads and Links

- [My Shapefiles](#)
- [Random Guide 1](#)
- [FAQs](#)
- [BAS External Website](#)
- [Random Link](#)

FOR MORE ON PARTNER PORTAL, PLEASE CONTACT ME
PRIVATELY FOR A SHOWING OF MORE MOCK UPS AND
THE OVERALL USER FLOW OF THIS PROJECT .