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*Connecting  
with Citizens*



## Eye on the Future

# Digitalizing Treasury Financial Management for the Present and Future

By Tamia Williams

One of the great things many of us learned in 2020 is that we can still meet the demands of our jobs through technology. In the federal government, however, bound in paper and PDFs, guidance on financial management (FM), such as the Treasury Financial Manual (TFM), can become a barrier to success. While the TFM can be hard for newcomers to navigate and understand, experienced government accountants, familiar with its tangle of volumes and chapters, system requirements and use cases, always fear the information is out of date.

That is changing.

In the past year, the Bureau of the Fiscal Service (Fiscal Service) has been building the Treasury Financial Experience (TFX) website, a digital, user-centric resource that makes federal FM guidance more accessible. For users, TFX means clear, intuitive navigation; a robust, meaningful search tool; and up-to-date information and guidance.

Building such a website is no small feat. The TFX team first made sure users actually wanted and needed the site and its tools. Last fall, the team launched the beta version of TFX and continues to develop the site on a regular basis with additional content and features.

Constructing TFX to work for users is a three-fold process:

### 1 Transform the way federal FM guidance is organized and presented.

Simply recreating Fiscal Service guidance in a digital format would do little to help users. The TFX team works with the agency's subject matter experts (SME) to map out guidance in a way that illustrates the depth, variety and complexity of the FM content. Significantly experienced in working with the TFM, the SMEs help the team incorporate clear, simple language into site content to produce the comprehensive material users need. Oftentimes developers must move content to more logical functional areas so users can find information with straightforward site navigation.

Because Fiscal Service guidance is copious, the TFX team uses a phased, coordinated approach to inventory, cleanse, categorize, tag, and systematically migrate federal FM content to the site. The beta release presented disbursing guidance by dividing the subject into five components: funding payments; agency operations; issuing payments; reporting payments; and auditing reports. The initial success of the disbursing area encouraged the team to move on to the topic of collections, using the same format.

### 2 Engage users and stakeholders and get their feedback.

The TFX team encourages feedback from users and stakeholders through demos, surveys, and straightforward requests. Through AGA events and the TFX listserv, the Fiscal Service was able to establish a community of users interested in TFX and its development. The community helps the Fiscal Service foster buy-in for the site, ensure TFX meets user needs, and fuel a continuous improvement process that validates future enhancements. The current version of the site is truly a product of user feedback.

In March 2020, Fiscal Service representatives demonstrated the site at a training event hosted by AGA's Washington D.C. Chapter and surveyed attendees on their initial impressions. In April, the TFX team conducted a card-sort exercise, through which users who regularly work with TFM disbursing materials suggested a structure for the disbursing content. In July, the TFX team hosted two focus groups to solicit feedback from representatives of 16 agencies on site features, organization and content. These and other exercises fundamentally drove the direction of TFX development and its burgeoning success.

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### 3 Adopt an Agile framework for software development.

Incorporating feedback is vital to developing a website that meets users' needs, but it is never a "one-and-done" activity. As new versions of the site are developed, they require more feedback to move the project forward. For example, a stakeholder request might not work as anticipated, or site changes might trigger new ideas and features. With an Agile framework for site development, the TFX team can quickly and regularly incorporate feedback and prioritize stories with the greatest potential value to users and stakeholders.

Over the coming fiscal year, the TFX team plans to add more content and features to the site for an ever-improving user experience. New content related to collections, budgeting and financial reporting, along with a searchable glossary, are currently in development. We encourage you to visit us at [tfx.treasury.gov](http://tfx.treasury.gov) — and visit often — for streamlined access to FM guidance. 📖



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