eBenefits 686 Usability Study Topline Summary

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Research Folder

Mural Board

This topline summary is a result of the synthesis that happens after conducting/observing research sessions. This is a high level summary of trends and analysis, but is not the final result of working with the data discovered. The information in this document may change following a deeper review and analysis of the data gathered.

The goal of this document is:

- To make sure everyone who observed the study is in alignment with the perceived findings
- To gain insight from team/stakeholder/designers and determine specific directions to pursue as we analyze the data

Research Questions & Answers

- ***Do participants understand the 21-686c is a multi-purpose form? And do they understand and accept the "checkbox" selection of the various 686 workflows?***
  - All participants who were prompted with the add spouse & child flow were able to discern that the form was multi-purpose
  - When asked in a post test interview, participants who were prompted with multi-purpose form tasks mentioned that they would prefer to complete multiple tasks in the same form over doing them individually
  - There may be a percentage of users who are more likely to fill out one flow to completion, then start over for another flow.
- ***Are the forms presented clearly and easy to understand by Veterans?***
  - Overall, the forms were clear and easy for Veterans to understand

- ○ There is a need for some contextual help/definitions regarding specific cases (e.g. explaining why some info is needed)
  - ■ *"Just the VA file number and service number, maybe an explanation for that. I don't know if the service number is the same as your SSN."*
- ○ Most participants stepped through the form quickly and did not require prompting
- ● ***Where do users need examples, guidance or section headers as they interact with the form?***
  - ○ Participants stopped to understand the different types of marriages listed in the "add spouse" flow
  - ○ Participants wanted to know what exact documents they needed to upload as proof to add their dependents
    - ■ *"This is a lot of tax information that you may not have. I think this information should be included within the first page that you need."*
  - ○ "What are the implications if I have reason for separation, if you are separated because you have jobs in two different cities. Are there implications to the benefits at all if you are separated?"
  - ○ *"Are there implications if they have been married to someone that was in the military? A box that will explain what the implications are if they have va benefits already. "*
- ● ***Where are the pain points in the longer workflows (add-spouse/add-child, add-student)?***
  - ○ No *major* pain points were observed, but participants did stumble on the following
    - ■ Vague language around schooling (couldn't discern between high school and higher education)
    - ■ Participants usually stopped to read the "type of evidence needed" sections of the forms
    - ■ Participants often wanted to know why they needed to send certain information to the VA (address of ex-spouse, child's financial history)
- ● ***What are users' experiences with the current 21-686c (paper, digital, VSO, etc.)?***
  - ○ A few participants had experience using a paper form but did not know what it was called
  - ○ One participant has used eBenefits to submit a 21-686c form in the last year
    - ■ They mentioned that this process was similar to their eBenefits experience

- ○ One participant mentioned that the VA version was simpler to step through than the paper form
- ● *Do participants know they have to report changes in their dependents status?*
  - ○ There was only one participant who stated that they did not know they had to report when their child stopped attending school
- ● *What workflow combinations (scenarios) do users think are likely?*
  - ○ Some workflows fit together, though they may be done separately because of time (divorce & remarriage, add student/remove student)

Hypotheses & Answers

- ● *Users will accept the checkbox selection of multiple forms, but will be wary about picking too many workflows at once.*
  - ○ All participants selected the appropriate checkboxes and did not have any questions about the options presented
- ● *Users will require clarification or guidance at various points; The upload feature may create some confusion/frustration with its position at the end of the form.*
  - ○ There was no confusion around how to upload, but some participants did question what types of documents they would need
  - ○ Regarding birth certificate upload: *"If it is for the stepchild where you have to put in the SSN. The VA could just run the SSN and see if the person is the mother or father. If I didn't have it then it would just hold everything up."*
- ● *Users may not be immediately aware of the change in workflow "chapters" as they navigate the form.*
  - ○ All participants recognized when they were moving into a new "chapter" during the "add spouse & child" flow
- ● *Some users will find the add-spouse workflow will be problematic in it's length and the repetitive section of former marriages. The "remove" dependent flows will be easily understood.*
  - ○ A majority of participants questioned why they needed to provide some information to the VA (e.g. providing address of ex-spouse)
  - ○ All participants completed the remove flow without hesitation or confusion

Notes

- ● A few participants had been through the process of adding or managing their dependents but were not familiar with the term 21-686.

- ○ They mentioned getting assistance via phone or at a facility
- ○ *"it was self-explanatory whereas the paper form I was not sure. I had to have the DAV assist with submitting the form."*
- Wayfinding/Navigating
  - ○ The biggest hurdle for participants was finding the form
  - ○ Most participants looked at the Disability and Records boxes on the homepage before resorting to various sections of the "VA Benefits and Health Care" dropdown in the menu
    - ■ When asked, participants stated they were looking for "something to do with dependents" or "add or manage"
- Most Veterans wanted to print the review and/or confirmation screens
  - ○ *"One this page where is says print this page for records, having a print button to click would be easier than having to go to the tool bar up top."*
  - ○ *"Maybe being able to print it off to save it as a file, people like to have the evidence that they submitted it at this time and this is what I put in there."*
  - ○ "What I am missing is the form that I can print out that proves that I did it."