

Research Plan 2

[Team MOVE, Health Hubs, Date]

Background

This study is a continuation of what will be a series of studies intended to create a thorough understanding of the informational needs around health care benefits for veterans. The purpose is to improve usability and overall user experience for veterans as they learn about, get and manage their health care benefits. As MyHealtheVet, Cerner, and other systems are consolidated, it is critical to gain an understanding of the needs, wants, and pain points around how they get, understand, and use their health care benefits.

The first test used TreeJack (a usability testing tool in Optimal Workshop) to test two competing structures of information architecture for the “Health Hub” and all associated health care benefits content and tools. The intent was to test what worked better for vets; a clear delineation of “Get health care benefits” and “manage”, or a more integrated structure. It is the findings from this initial test that will influence and start to shape the solution as we move forward in our inquiry.

The Problem:

Veterans find it extremely difficult to navigate commonplace interactions with the VA. The VA ecosystem is so complex that Veterans feel discouraged to learn about, apply, maximize, and manage their benefits.

This experience extends online. There is a fragmentation in information and tools. In particular, navigating between general information and personalized information and tools is difficult. Veterans (will) come to VA.gov to learn what benefits are available to them, apply, and then track and manage those benefits. While these are distinct stages, we expect that Veterans will need to continue learning about their benefits during the application process, and when managing their benefits.

As the team considers how to include the Health Apartment on VA.gov, this research effort is intended to update and improve the information architecture of VA.gov related to benefits. In this particular case, health care benefits are the focus. Health care benefits hold a unique place in the VA ecosystem as a service that attributes, dependencies, and use cases that are particular to both veterans and the nature of health care itself.

Team MOVE is setting out to understand user needs, behaviors, and challenges inherent to the problem to then devise the most effective solution by carrying out a series of studies.

[\[Mural that briefly explains the problem\]](#)

[\[Product brief for the health apartment\]](#)

[Research Plan 1: Tree Test]

[Research Plan 1: Tree Test Findings]

OCTO objectives

This effort supports the following OCTO objectives:

- Veterans and their families can find a single, authoritative source of information
- Veterans can manage their health services online
- Logged-in users have a personalized experience, with relevant and time-saving features

Veteran journey

Veteran tasks fit into the following key points in the [Veteran journey](#):

- Primary point in the Veteran journey: “Taking care of myself”
- Secondary points: “Starting up,” “Putting down roots,” “Retiring,” and “Aging”

Research goals

How we might create an experience that allows Veterans to easily find the content and tools they need of where they are in their VA health care journey. The solution must address the following key need states:

- learning about the benefit
- applying for the benefit
- getting started with the benefit
- or managing their care and health benefits?

We want to understand how Veterans might navigate between tasks in ‘get benefits’ and ‘manage benefits’ on proposed changes to VA.gov. We will first explore how this works with health care, and later consider how our learnings will impact the other benefits.

Outcome

To build upon and extend findings from the Health Hub tree test as well as to answer questions that arose or could not be addressed in the tree test. To understand (and build consensus) how to best organize the information architecture and navigation for ‘get benefits’(learning about and applying for) and ‘manage benefits’(using benefits) on VA.gov. We’ll use the insights from this research to design a solution, prototype it, and then test the prototype for further validation and refinement of the design.

Research questions

1. **What are the most difficult aspects of learning about, applying for, getting started with, and managing health care benefits online?**
2. What information do Veterans need to repeatedly find or refer to when managing their care?
3. What are transition experiences in the VA health benefits user journey between learning about a benefit and managing a benefit? What informational needs do veterans have in these transitions?
4. What information needs veterans to have on an ongoing basis once they are using VA health care benefits?

Hypothesis

- The problem at hand is complex and nuanced. Evaluating two potential approaches to structuring the information architecture is informative and yields a certain type of finding, it leaves gaps in our knowledge. To address the problem effectively demands that we fill in those gaps with a better understanding of our users’ needs, desires, and pain points. Simply put, without knowing ‘why’, our knowledge will be incomplete.

Method

This segment of the research is intended to provide an understanding of veteran need associated with health care benefit information through primary qualitative inquiry.

The team will conduct <~10-15> 1:1 interviews with veterans and caregivers across a range of demographics. Participants will be selected to provide a representative sample of the overall veteran population, with an emphasis on underserved populations.

Participants will be engaged in a structured conversation that will utilize a conversation guide consistently across all participants. Similar to the tree test, there will be two discrete groups of participants, veterans and caregivers. Two versions of a conversation guide will be created and tailored to each participant group. Both versions of the conversation guide will be based on the research questions in this plan and will allow the interviewer to pursue lines of inquiry as they emerge. The guide should be viewed as a flexible thing rather than strictly prescriptive to allow it to adapt as the interviews are conducted in the event of emergent patterns, dead-end questions, and the like.

Location

This study will be conducted remotely via Zoom

Research materials

CONVERSATION GUIDE

TREEJACK TEST ANALYSIS

Note: your OCTO/VA lead must review and approve all research materials – including this plan – prior to submitting a recruitment request.

Provide a link to any materials you need to run your study, including any materials needed for set up and recruitment.

For moderated interviews:

- Action Item: Conversation Guide <link here>

For moderated usability tests:

- [Link to conversation guide](url goes here)
- [Link to prototype](url goes here)
- Link to prototype or OptimalSort session for group B](url goes here)

Recruitment

Ask Perigean to recruit 126 people using the cohorts below in order to get at least 25-50 completes for each hypothesis. Ideally, we would like to have:

- 1/7 of recruited participants Veterans' family members or caregivers who help a Veteran manage their VA health care
- 6/7 of participants are Veterans
 - 1/2 are enrolled in VA health care with a preference for those who have used the MyHealtheVet online health management tool within the last year.
 - 1/2 Veterans are not enrolled in VA health care with a preference for those who do not receive any other VA benefits
- We want to ensure we research with the following underserved Veteran populations:
 - Females
 - Minorities
 - Lower education
 - LGBTQ2+
 - Cognitive disorder

- Candidates may meet several secondary criteria so long as a minimum number of identified underserved Veteran populations identified are represented in the data pool.

****This [spreadsheet describes](#) each cohort. ****

OCTO works with Perigean, a small business, to handle the [recruitment](#), scheduling, and compensation of Veterans and caregivers.

Before writing your recruitment criteria, be sure to review the following resources.

- [Refer to the Perigean Recruitment Guidance](#) to learn how Perigean recruits, screens, and prepares participants for research.
- [Refer to the inclusive recruitment strategies](#) to learn how to be inclusive of underserved Veteran communities.

Recruitment approach

Who is your intended audience for this research (e.g. Veterans, caregivers, VSOs, SMEs), and how will you recruit them?

Pro tip:

- For remote moderated studies with Veterans and caregivers, we recommend using Perigean to recruit participants.
- Perigean cannot recruit VA employees or VSOs. Working with your VA leads to recruiting these groups.
- Perigean can also support remote, unmoderated studies, however, these studies require strict recruitment requirements. (Additional guidance forthcoming; reach out to #research-ops in the interim.)

Which inclusive research strategies are you leveraging for this study? OCTO recommends using a lean maximum variation strategy for most studies. Refer to the

resources above to learn more. Read this [introduction to inclusive research](#) and use the [recruitment checker \(google sheets\)](#) to understand OCTO's targets for inclusivity.

Recruitment criteria

List the total number and type (Veterans, caregivers, etc.) of participants for this study.

Primary criteria (must-haves) What demographics, experience, and scenarios do you need participants to meet to effectively run your study?

Write any recruitment criteria for experience or scenarios as screener questions with qualifying responses. Perigean will use these verbatim to recruit participants. Consider providing links to products and/or clear descriptions to ensure participants understand the question. Example: Have you been to a VA urgent care facility in the last 6 months? [answer should be yes to qualify.]

Tip: The more recruitment criteria you have, the less likely that a small sample of participants will be able to meet all criteria. Consider how you could leverage the [lean maximum variation sampling \(MVS\) approach](#) by breaking up criteria for your study into multiple cohorts that each isolate one primary criteria. Perigean will consider each cohort as a separate recruitment effort, increasing the chances of meeting all criteria for your study. [Go to an example of the multiple cohort approach.](#)

Secondary criteria (nice-to-haves) What criteria would strengthen your results?

Timeline

Please submit artifacts for [Research Review](#) 8-9 days prior to the first planned research day for remote studies so Perigean can begin recruiting one week prior. Perigean requires 2+ weeks for in-person.

Prepare

When will the thing you are testing be finalized? Ideally it's ready a week before testing begins and has also been through a [Midpoint review](#).

A pilot session is required. Please indicate the date and name of a mock participant for a pilot session.

- Pilot participant email:
- Date and time of pilot session:

Research sessions

- Planned dates of research:

Length of sessions

- Session length: (e.g. 30 minutes, < 1 hour, up to 2 hours, up to 4 hours)
- Buffer time between sessions: (30 minutes recommended to reset between sessions, debrief with team, if a participant arrives late, or a session goes slightly over time)

Availability

When would you like sessions scheduled? Please list exact dates and times in EASTERN Standard Time. *Note: we recommend providing availability outside of work hours, as many Veterans are only available before and after working times, and live across the U.S.* Please request enough dates and time slots for the number of requested participants. (e.g. Monday 9-1, 3-6; Tuesday 9-6, etc.).

Team Roles

Please list the people who will be serving in each role. Include the primary phone number for moderator and the emails for moderator, notetaker, and observers. If you need Perigean to take notes for you, indicate that next to Notetaker

- Moderator:
- Research guide writing and task development (usually but not always same as moderator):
- Participant recruiting & screening:
- Project point of contact:
- Participant(s) for pilot test:
- Note-takers:
- Observers: List email addresses for those who should attend and observe the sessions: VA Stakeholders, engineering team members, design team members, any other people who might find this research relevant to their work
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