

VA



U.S. Department
of Veterans Affairs

“Sign as a Representative”

Research Readout

Background & Goals

Background

This study is being conducted by the Veteran-Facing Services and Applications Caregiver team.

The Caregiver team launched the digitized 10-10CG form October 1, 2020. Currently, the team is exploring adding functionality that will allow a Veteran's legal representative to be identified and provide supporting documentation (e.g. power of attorney) to be optionally uploaded.

Two designs have been created to support the additional functionality of identifying and signing as a legal representative.

Research goals

- The goal of this user research study is to test desktop and mobile prototype versions of the two representative workflow options and understand the usability of the flows.

Hypotheses to be tested

Users will be able to navigate through the form relatively easily, but may have issues with the following:

- The terminology/content within the representative workflows might be confusing
- The representative workflows might stop users (especially caregivers who are not legal representatives) from completing the form
- Knowing if a Veteran or caregiver should select the Primary Family Caregiver or Secondary Family Caregiver workflow

Methodology

Methodology

Method

We conducted 10 remote moderated usability sessions via Zoom using the Perigean contract. This method allowed us to share a high-fidelity wireframe prototypes (mobile and desktop versions) to confirm if the representative workflows are easily usable by caregivers and Veterans.

Who we spoke with

- **3 Veterans**
- **1 Veteran who is also a caregiver** (assists neighbor who is a Veteran)
- **6 Caregivers** (4 of whom are legal representatives)
- **Gender:**
 - Male: 2
 - Female: 8
- **Geographic locations:** VA, IN, PA, GA, LA, TX, FL, MO
- **Device used during study:**
 - Mobile: 5
 - Desktop: 5
- **Ages of our participants** ranged from 45 to 75+
 - 45-54: 5
 - 65-74: 1
 - 75+: 2
 - Unknown: 2
- **Education:**
 - High school diploma (or equivalent): 1
 - Some college (no degree): 1
 - Associate's degree/trade certificate/vocational training: 2
 - Bachelor's degree: 3
 - Master's degree: 1
 - Unknown: 2

Research questions

- Are users confused by any particular aspect of the representative workflow?
- Does the representative workflow prevent users from completing the form?
- Would a user upload a document from their mobile phone or only from a desktop computer?
- Does one of the representative workflow options perform better than the other with regards to understandability, usability, and ease of use?

Research Findings

Key Findings

1. The representative workflow stopped some Caregivers who did not have legal representative status from completing the application.
2. Most participants found the content on the legal representative page helpful in making a selection.
3. Some participants with legal representative status did not have documentation easily available and it was unclear if they could continue without it.
4. Asking the legal representative question as the first question in the form caused confusion with participants who associated applying for the program with designating a legal representative.
5. Veterans filling out the form for themselves and caregivers who regularly act as legal representatives understood the legal representative question and were able to complete the workflows easily.
6. All participants that entered the legal representative's name on behalf of the Veteran found the experience to meet their expectations and had no issue completing the “Representative's statement of truth.”

Research Findings

1. The representative workflow stopped some Caregivers who did not have legal representative status from completing the application.

- Caregivers who were not legal representatives questioned if having legal representative status was a requirement for submitting the application and being part of the PCAFC.

“It is leaving me to believe that I would have to have a legal document before I can even fill that out...If I am even qualified to be considered a caregiver.”

“I don't have power of attorney or anything...If I push no, it's going to probably say that I cannot submit the form.”

“I would expect it to kick me out and say, ‘you do not qualify.’ ”

The screenshot shows a web form titled "Step 4 of 5: Legal Representative". It includes an explanatory paragraph about legal representatives, a question about whether the user is a legal representative, radio button options for "Yes" and "No", a dropdown menu for "What documents can I submit to show legal status as a representative?", and "Back" and "Continue" buttons at the bottom.

Step 4 of 5: Legal Representative

A legal representative, or someone with power of attorney, can fill out this application on behalf of the Veteran. A representative is someone other than the Veteran who, under law, has the authority to act on behalf of the Veteran, or who can make legal decisions about their responsibility or care.

You'll also have a chance to submit documentation to show status as a legal representative.

Are you filling out this application as a Veteran's legal representative?

☐ Yes

☐ No

What documents can I submit to show legal status as a representative? ▾

« Back Continue »

Research Findings

1. The representative workflow stopped some Caregivers who did not have legal representative status from completing the application (continued).
- Some participants questioned if their marriage certificate or if being a parent would be sufficient for proving legal representative status.

“I am hoping a marriage license works.”

“After reading that, I would have to say no because I don’t have documentation, unless they are okay with my marriage license. I would think that my marriage license would be suffice, would be sufficient enough.”

Research Findings

2. Most participants found the content on the legal representative page helpful in making a selection.

- Participants found words such as “power of attorney” and the “What documents can I submit to show legal status as a representative?” component helpful. Some participants pointed to the “Note” within the component as helping clarify any confusion.

“That’s what I would be asking...‘what does that mean and what am I going to have to upload?’ ”

“One participant reading the “note” stated, “‘Being a Veteran’s closest family member or next of kin doesn’t automatically give you legal status as their representative’, there it is...”

The screenshot shows a web form titled "Step 4 of 5: Legal Representative". It contains explanatory text about legal representatives, a question about whether the user is filling out the application as a legal representative with radio button options for "Yes" and "No", a section titled "What documents can I submit to show legal status as a representative?" with a list of document types, and a "Note" clarifying that being a family member does not automatically grant legal status. At the bottom are "Back" and "Continue" buttons.

Step 4 of 5: Legal Representative

A legal representative, or someone with power of attorney, can fill out this application on behalf of the Veteran. A representative is someone other than the Veteran who, under law, has the authority to act on behalf of the Veteran, or who can make legal decisions about their responsibility or care.

You'll also have a chance to submit documentation to show status as a legal representative.

Are you filling out this application as a Veteran's legal representative?

☐ Yes

☐ No

What documents can I submit to show legal status as a representative? ^

Documentation to show your legal status as a representative could include:

- A current power of attorney document or legal guardianship order, **or**
- A similar legal document or certification issued by an appropriate attorney, including a federal, state, local, or tribal law that establishes such authority.

Note: Being a Veteran's closest family member or next of kin doesn't automatically give you legal status as their representative. You'll still need to provide documentation to show you can legally act as their representative.

[<< Back](#) [Continue >>](#)

Research Findings

3. Some participants with legal representative status did not have documentation easily available and it was unclear if they could continue without it.

- Both of the participants that applied on their phone did not have documentation readily available.

“I have his power of attorney, I have all of that...I would not have it with me.”

“Well, I couldn’t get the forms if I wasn’t at home. I’d have to wait until I got home. I would have held off on the application and finished it at home.”

- One participant on applying on a computer found the question too burdensome.

“I’m not going through these extra steps.”

Step 4 of 5: Supporting evidence

If you're signing as a legal representative, you can upload supporting documents showing your authority to complete this application on behalf of the Veteran.

Upload your supporting documentation

You can upload document in a .pdf, .jpeg, or .png file format. You'll first need to scan a copy of your document onto your computer or mobile phone. You can upload the document from there.

Guidelines for uploading a file:

- File types you can upload: .pdf, .jpeg, or .png
- Maximum file size: 25MB

A 1MB file equals about 500 pages of text. A photo is usually about 6MB. Large files can take longer to upload with a slow internet connection.

Upload

« **Back** **Continue** »

Research Findings

4. Asking the legal representative question as the first question in the form caused confusion with participants who associated applying for the program with designating a legal representative.
- One participant referencing end of life decisions stated:
“To make sure that she would be the point of contact for any medical decisions that needs to happen...”

Research Findings

5. Veterans filling out the form for themselves and caregivers who regularly act as legal representatives understood the legal representative question and were able to complete the workflows easily.

“Well, this is asking about a legal representative, which I am not, and I don’t have either, I’d put no.”

“You learn to have it, your POA form, so in 12 years I have submitted, I think in the first 6 years I have sent one every month...”

Research Findings

6. All participants that entered the legal representative's name on behalf of the Veteran found the experience to meet their expectations and had no issue completing the “Representative's statement of truth.”

“Oh, I like this..since I clicked yes, I would be putting my name here on behalf of [Veteran’s name] and I am certifying...That makes sense to me.”

“The first line is where I would be, the representative...The second line is his name because he is the Veteran.”

Step 5 of 5: Review application

Veteran information +

Primary Family Caregiver applicant information +

Secondary Family Caregiver applicant information +

Please review information entered into this application. The Veteran and each family caregiver applicant must sign the appropriate section.

Representative's statement of truth

I certify that I give consent to the individual(s) named in this application to perform personal care services for the Veteran upon being approved as Primary and/or Secondary Family Caregivers in the Program of Comprehensive Assistance for Family Caregivers.

I have read and accept the [privacy policy](#).

Enter representative's full name (*Required)

On behalf of

Enter Veteran's full name (*Required)

☐ I certify the information above is correct and true to the best of my knowledge and belief. (*Required)

Additional Insights

- Some participants were confused by the “Would you like to add a Primary Family Caregiver” question.
- A couple participants began to enter their physicians information on the Primary Family Caregiver’s page. One participant noted that this was because they previously were on the “medical facility” screen.
- Some participants were confused by the word “add” in the question.

“We are applying for the family caregiver program...Why is it asking me if I want to ‘add a primary family caregiver?’ Isn’t that what I am applying for?”

"I just don't think the Veteran is filling out this form."



Step 2 of 5: Primary Family Caregiver applicant information

Would you like to add a Primary Family Caregiver? (*Required)

[Learn more about Primary Family Caregiver](#)

☐ Yes

☐ No

[« Back](#) [Continue »](#)

Additional Insights

- Participants seemed to understand that the Secondary Family Caregivers serve as backup to the Primary Family Caregiver. However, A few participants had questions around the requirements of a Secondary Family Caregiver.

“Do they need to be in the house with the Veteran?”

"My son is 16, does he qualify?"



The screenshot shows a survey form with a progress bar at the top indicating four steps, with the third step highlighted. The title is 'Step 3 of 5: Secondary Family Caregiver applicant information'. The main question is 'Would you like to add a Secondary Family Caregiver?'. Below this is a link 'Learn more about Secondary Family Caregiver' with a dropdown arrow. There are two radio button options: 'Yes' and 'No'. At the bottom are two buttons: 'Back' with a left arrow and 'Continue' with a right arrow.

Step 3 of 5: Secondary Family Caregiver applicant information

Would you like to add a Secondary Family Caregiver?

[Learn more about Secondary Family Caregiver](#) ▾

☐ Yes

☐ No

[« Back](#) [Continue »](#)

Additional Insights

- The Medical facility page caused confusion with some participants. Participants noted that the Veteran sees multiple doctors at different locations. Making it difficult to make a selection.

"I still don't know what to put here because, Do I put the CBOC down because it's closer...or do I put the actual VA Medical Center down?"

- Regarding the recent medical care question:

"Do they want a VA medical center or any medical center? Why would they want that? I don't know what I would put down here."

Recent medical care

Please enter the name of the medical facility where the Veteran **last received medical treatment**.

Name of medical facility

Was this a hospital or clinic?

VA health care services

Please select the VA medical center or clinic where the **Veteran receives or plans to receive health care services**.

A Caregiver Support Coordinator at this VA medical center will review your application.

State **(*Required)**

VA medical center **(*Required)**

« Back

Continue »

Recommendations

Recommendations

Legal Representative:

- Place the legal representative question towards the review page.
- Make it clear that legal representative status does not impact eligibility to the Program of Comprehensive Assistance for Family Caregivers.
- Present content in a less intimidating way while still keeping useful information such as “power of attorney” and the “What documents can I submit to show legal status as a representative?” additional info component.
- Explain that a marriage certificate does not automatically give legal status as the Veteran’s representative.
- Clearly explain why the legal representative question is being asked.
- Note that uploading supporting documentation for legal representatives is optional.

Recommendations

Primary Family Caregiver:

- Explain why we are asking the Primary Family Caregiver question.
- Iterate on “Would you like to add a Primary Family Caregiver?” question to ensure a consistent voice throughout the form.
- Surface helpful content to make clear that the Primary Family Caregiver is the main caregiver.

Secondary Family Caregiver:

- Considering content that helps users make a confident selection.

Recommendations

Medical facility page:

- Clearly explain that the user can enter community care as well as VA facility for the recent medical care fields.
- Explain why the VA Medical facility question is being asked.

Next Steps

Next Steps

- Readout to Caregiver VA.gov team 3/5/21
- Incorporate recommendations into next iteration of design