Claim Status Tool

Summary of Claim Status Tool Research, 2020

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Why research the Claim Status Tool?

Intention

Andrea Schneider approached us with the idea of doing a series of research on the Claim Status Tool (CST).

Her **motivation** for this request was based upon:

1. **The Claim status tool is by far the most used pages on VA.gov (27% of all pageviews).** It is not uncommon for veterans to check their claims or appeals multiple times per week (see slide 15).
2. A research **report from NCC** (National Call Center) showing that **most calls to the VA call center (74.5%) were about claims or appeals (**see slide 18).
   - Approximately **61% of the calls where about the status of a claim or an appeal specifically**, which is of course the main purpose of the CST.
3. The current CST has not been modified or reviewed for over 3 years.

For these reasons, Andrea wanted us to research the current CST, and, using a *Blue Sky Approach,* to do some **discovery research** into what a new CST would look like.

Background and goals

With this research, we wanted to **understand**:

- What do users expect and want in a new CST?
- Why do so many veterans call about claims and appeals?
- What are the most common use cases? What relevant use cases are not served by the current tool?
- If anything was possible, how would veterans design a new Claim status tool?
- If this was a one-stop-shop for checking the status of all their claims and appeals, what additional actions would veterans like to be able to take within the tool?

The **main goals for a new CST:**

- To potentially **reduce the number of calls** about claims and appeals to the VA call centers.
- To **create a good user experience** with a tool that is used often, by many veterans.

Competitive Analysis

Background and Research goals

- Understand how other companies and organizations are handling status tracking, including the use of email and SMS updates.

- Learn about best practice for tracking status/claim.

Top takeaways

What type of information is highly prioritized (and often visualized)?

- The **current status** of the claim/appeal/order.
  - Showing the **current step** and **remaining steps**.
- An estimated **processing time** and **timeline**.

What other info and features are **often provided?**

- Clearly outlined **expectations for the next steps.**
- A section for the full **case history.**
- An option to receive **email and SMS updates.**
- Options to **print & edit info** and **delete uploaded files.**
- **Allow** users to **filter** their **data** effectively.

How do companies motivate users to finish a claim process?

- **Pre-populate** as much user **data** as possible.
- **Save** and **show** clearly **any progress** being made.
- **Show** clearly the users **goal proximation**.

What is provided when there is a long waiting period?

- Users are provided with **clear, regular updates when any relevant change occurs.**
  - **Including push alerts** (through **email** and **SMS** as option).
  - Allow users to **choose frequency of updates.**

Previous Research Review

Background & goals

- We wanted to review all relevant research and resources that exist internally on the current Claim Status Tool.

- Understand better what research is still needed to be done on the current Claim Status Tool.

Key Findings study 1 (February 2018)

- **Veterans find it critically important to know about any progress of their claim.**
  - Is my claim moving along / in progress, or is something slowing it down?
  - When is my claim getting into the hands of a Veteran Service Representative?

- **The evidence gathering process is time consuming and confusing**.
  - Veterans don't have all the info they need about evidence gathering within VA.

- **When veterans see an alert on VA.gov, they want to look up additional, detailed information.**
  - They want to know e.g.: *"why am I not eligible for the new claim process?"*

Key Findings study 2 (September 2019)

- **Participants generally found the Claim Status Tool helpful.**

    - Many positive comments were attributed to the '*landing view'* of the Claim Status Tool.

    - Participants valued the '*find out why we sometimes combine claims'* info and the summarized information for each claim.

    - Many positive comments were attributed *'claim detail'* page. Specifically, comments around the visual indicator of where the VA is in the process of reviewal of their claim and estimated date**.**

- **Participants expressed the desire to confirm file uploads and accuracy.**

    - Participants wanted confirmation that they had sent the correct information to the VA, to view previously uploaded documents and remove documents if uploaded in error.

Quantitative Analysis

What we did

- Google Analytics analysis - Looked at overall pageviews, traffic/tool usage, entrances and exits and referral sources

- NCC research - reviewed a sample of 781 calls (roughly 10% of all calls received) from the weeks of 2/10/20 and 2/17/20. (The purpose was to capture information related to va.gov and the specific reason for the call – post accessing the information on the self-service portal.)
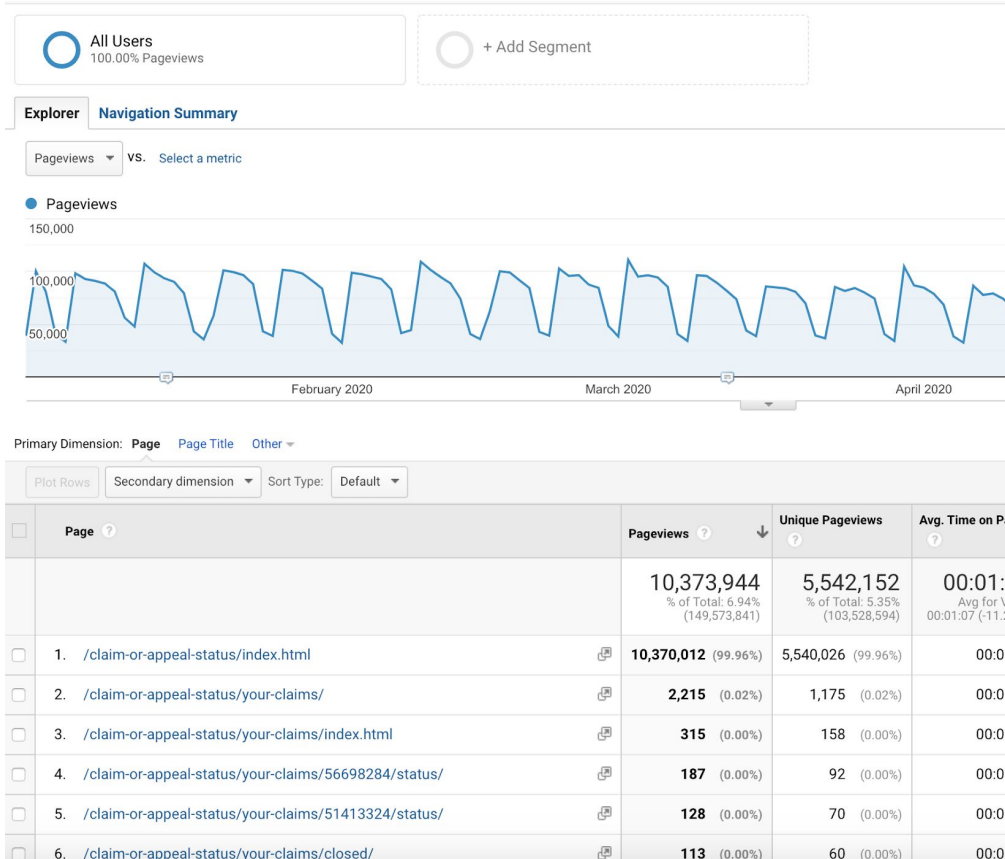
Overall Traffic / Usage

Range: Jan 1 - May 28

- 10.375 million pageviews
- 5.42 million unique pageviews (no duplicate user views)

For the entire /claim-status/ or /claim-or-appeal-status/ directory (both go to tool):

- 45.5 million pageviews
- 33.5 million unique pageviews (no duplicate user views)

Overall Traffic / Usage

Range: Jan 1 - May 28

For the entire /claim-status/ or /claim-or-appeal-status/ directory (both go to tool):

- 45.5 million pageviews (27% of total)
- 33.5 million unique pageviews (no duplicate user views)

This made the claim status tool the single most utilized tool on va.gov for the given time frame. **Out of roughly 168 million views, the claim status tool constituted about 27% (45 million views).**

Primary Dimension: **Page path level 2**   Page   Other ▾

Secondary dimension ▾	Sort Type:	Default ▾	

| Page path level 2 ⍰	Pageviews ⍰ ↓	Unique Pageviews ⍰	A
	167,688,337 % of Total: 38.17% (439,352,031)	119,228,843 % of Total: 37.86% (314,913,920)	
1. ▢ /track-claims/	35,179,179 (20.98%)	27,026,815 (22.67%)	
2. ▢ /	19,991,808 (11.92%)	11,980,476 (10.05%)	
3. ▢ /disability/	12,165,778 (7.25%)	8,551,123 (7.17%)	
4. ▢ /education/	11,118,059 (6.63%)	8,484,342 (7.12%)	
5. ▢ /claim-or-appeal-status/	10,373,930 (6.19%)	5,542,143 (4.65%)	
6. ▢ /auth/	8,435,656 (5.03%)	8,107,418 (6.80%)	
7. ▢ /health-care/	8,361,291 (4.99%)	6,364,478 (5.34%)	
8. ▢ /facilities/	6,178,788 (3.68%)	1,299,953 (1.09%)	
9. ▢ /find-locations/	5,169,912 (3.08%)	3,560,770 (2.99%)	
10. ▢ /records/	4,575,488 (2.73%)	3,237,157 (2.72%)	

Entrances & Exits

Range: Jan 1 - May 28

Entrances

- Most were from va.gov homepage (50%)
- Next largest source was login functionality (likely logging in and redirecting back to CST) (34%)

Exits

- 50% back to track claims index page
- 30% to re-logging in
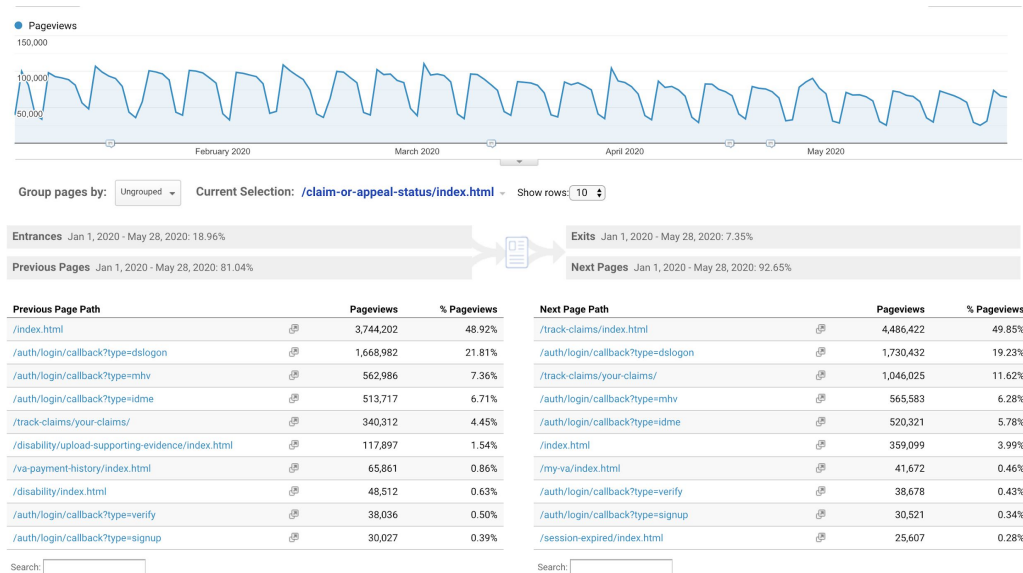
Referral Sources

Range: Jan 1 - May 28

- Top referral source was Google
- Most referral sources were search engines or search functionalities

	February 2020	March 2020	

Primary Dimension: **Page**   Other ▾

Plot Rows	Secondary dimension: Full Referrer ▾	Sort Type:	Default ▾

☐	Page ❓	Full Referrer ❓ ✕	Pageviews ❓ ↓	Unique Pag... ❓
			10,370,012 % of Total: 6.93% (149,573,841)	5,54 % of T (10
☐	1. /claim-or-appeal-status/index.htm l 🔗	google	**5,451,461** (52.57%)	2,870,339
☐	2. /claim-or-appeal-status/index.htm l 🔗	(direct)	**2,568,831** (24.77%)	1,436,948
☐	3. /claim-or-appeal-status/index.htm l 🔗	bing	**987,250** (9.52%)	500,679
☐	4. /claim-or-appeal-status/index.htm l 🔗	lnks.gd/	**305,716** (2.95%)	166,630
☐	5. /claim-or-appeal-status/index.htm l 🔗	yahoo	**283,620** (2.74%)	144,711
☐	6. /claim-or-appeal-status/index.htm l 🔗	search.usa.gov/	**116,443** (1.12%)	60,508
☐	7. /claim-or-appeal-status/index.htm l 🔗	search.usa.gov/search	**69,159** (0.67%)	34,709
☐	8. /claim-or-appeal-status/index.htm l 🔗	id.me/	**51,632** (0.50%)	32,802
☐	9. /claim-or-appeal-status/index.htm l 🔗	gov-delivery	**42,449** (0.41%)	23,907
☐	10. /claim-or-appeal-status/index.htm l 🔗	VEText	**31,188** (0.30%)	19,062

Call Types

We got these two slides from Andrea Schneider:

The following slides contain data we received from the NCC (National Call Center). They reviewed a sample of 781 calls (roughly 10% of all calls received) from the weeks of 2/10/20 and 2/17/20.
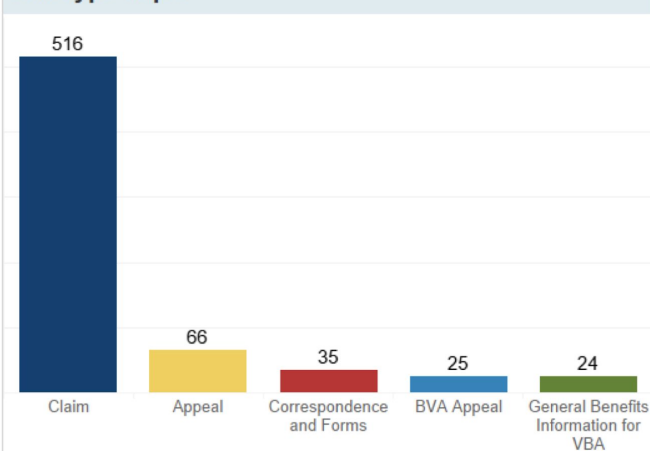
What were they calling in for?

- **66% were claim-related calls**
- **172 of 781 calls were multiple (same caller) ***
- **8.5% were calls about an appeal ***

*Note: we don't know if the calls were about the CST itself.

Call Type(s)

Call Type Top 5

	Claim	Appeal	Correspondence and Forms	BVA Appeal	General Benefits Information for VBA
	516	66	35	25	24

Call Type

Call Type		
Claim	516	66.1%
Appeal	66	8.5%
Correspondence and Forms	35	4.5%
BVA Appeal	25	3.2%
General Benefits Information for VBA	24	3.1%
Payments / Debts	16	2.0%
FOIA/Privacy Act	12	1.5%
Dependent Maintenance	10	1.3%
Compensation and Related Benefits	10	1.3%
General Status	8	1.0%
Explanation of Letter	7	0.9%
Amount of Payment	6	0.8%
Verifying VA Income	4	0.5%
eBenefits	4	0.5%
Date of Payment	4	0.5%
Contract Examinations	4	0.5%
Update Information	3	0.4%
Request for Benefit Letter	3	0.4%
ITF/Generate ITF	3	0.4%
Exam	3	0.4%
How to file	2	0.3%
General Benefit Information For NCA	2	0.3%
Address (CADD)	2	0.3%
Vocational Rehabilitation and Employment	1	0.1%
VBA Phone Number/ VBA Fax	1	0.1%
VASS	1	0.1%
Sensitive File	1	0.1%
Remote Proofing	1	0.1%
Referral to Another VA Business Line	1	0.1%
Other Dependency Related Call	1	0.1%
General Inquiry	1	0.1%
General Benefits Information for VHA	1	0.1%
Email Blank Forms	1	0.1%
Death of a Dependent	1	0.1%
Add Minor Children	1	0.1%

66% of Veterans who accessed VA.GOV, then contacted the NCC, were categorized into Claim related calls.

172 Veterans called multiple times during the two week period.

Questions asked

What were they seeking help for?

- 46% were asking about the status of a claim
- 14.7% were asking about the status of an appeal
- 15% was about *General info*
- 5.9% *Did you receive my evidence?*
- 5.5% *Where is my payment?*
- 3.3% *Copy of letter*.

Question(s) Asked
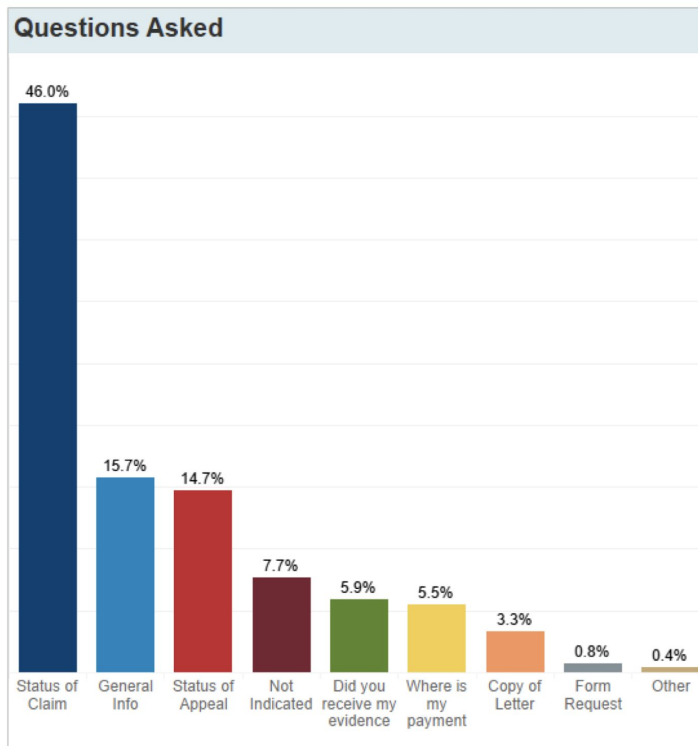
Questions Asked

Questions Asked		
Status of Claim	359	46.0%
General Info	123	15.7%
Status of Appeal	115	14.7%
Not Indicated	60	7.7%
Did you receive my evidence	46	5.9%
Where is my payment	43	5.5%
Copy of Letter	26	3.3%
Form Request	6	0.8%
Other	3	0.4%
Total	781	100.0%

Qualitative data from Call Center

Upload issues

- *"When I add the files and click upload, it shows that it's loading but nothing happens. I have let it sit for 10+minutes waiting for it to upload and nothing happens. I have tried it in PDF format as well as JPEG."*
- *"I have received forms to be completed and uploaded within 30 days, however, my claim Status reflects submitted 1/31/20 with unknown status at this time with no option to upload".*
- *"I'm on on the VA.gov website and logged in with me ID.me account. I went to the "Upload Evidence to support your claim" page (under Disability). I don't see a link to select to upload the documents (pdfs)".*

Claim status issues

- *"I filed my new claim on March 26, 2020. The VA.gov website shows "we don't know the status of your claim" in the status line".*
- *"I have a claim with the VA and I wanted to send some evidence to support the claim but the VA Website said I don't have a claim".*
- *"I am trying to find the expected date for my claim. It states "gathering evidence". I can't get it to go any further".*

Summary

CST is one of the most used tools on VA.gov.

- In a period spanning Jan 1 - May 28 (roughly 5 months) 10.375 million pageviews and 5.42 million unique pageviews for the claim or appeals status index page.

From the NCC support calls, most of the calls were claim or appeal related (74.5%).

- Even if the calls are about claims and appeals, we don't know if they necessarily are about the CST itself. We are waiting for a summary of the qualitative data from the call center study.

60.7% were asking specifically about the <u>status of a claim or an appeal.</u>

- Same comment as above. Are the calls about lack of info within, or issues within the CST, or are they simply calling about claims, independent of the tool?

There are specific issues with the CST, specifically with regards to Upload documents and check status of a claim.

- Veterans click on upload and nothing happens, or they see no options to upload documents.

- Veterans are shown in the CST that they don't have a claim, when they do, or that the status of their claim is unknown, or they see a generic message like "gathering evidence" but with no further details.

Collaborative Design Session & Usability test

Background & goals

- The idea behind this research effort was to combine a **usability study** of the current Claim Status Tool (for ⅓ of the time) with a **collaborative design session** with veterans (for ⅔ of the time).

- The research **results were mixed**. Many veterans felt it was difficult to do the design task. There might be several reasons for this: 1. The tool itself is very limited in scope and functionality, so coming up with new ideas can be challenging. 2. A design task like this can be abstract. 3. Only 8 of the 12 participants had tried the current CST.

- As several participants struggled with the method, we **changed it into a card sort.** The participants instead listed the **info, features and functions** they would like in a new Claim Status Tool, and **prioritized** them. (When they had exhausted their ideas, we had prefilled cards (blue cards) for them to choose and prioritize.)

Findings from 12 veterans

Overall findings:

What participants mentioned most often, were: **a lack of detailed** enough **information and** a lack of **updates**:

- **Lack of** detailed **information about progress** and details in each step
- **Lack of timelines** and more accurate **time estimations**
- **Lack of relevant and efficient updates,** and adequate communication about the progress

Detailed findings:

1. Participants that had used the tool (8 of 12) found the tool to be easy to use and straightforward, with few issues.
2. They like the steps on the *Detail* page, but find that vital info is missing. In Step 3 *(Evidence gathering, review, and decision*), they want more detailed info on progress and detailed time estimations.
3. They also want to know if there are issues with the claim, and/or actions they need to take, in order for the claim/appeal to proceed.

Features

This Mural Board shows the features and info participants prioritize highest in a new Claim status tool.

Most important features

Least important features

TOTAL TALLY 11 USERS

Check status of your claim or appeal - 15	Accurate Time estimation - 12	Steps/progress/ timeline - 9	What action is needed from VA? - 10	What action is needed from me? - 9	
Find the VA representative for a specific claim - 8	Email updates - 8	Text message updates - 8	Appeal directly from the tool - 8	Filtering options - 8	View and download decision letter - 8
Check date of submission for a claim - 7	View and download uploaded docs - 7	Checklist (actions in different colors) - 7	(Info on) Personal rep (VSO) - 7		
Upload new evidence / files - 6					
Chat with the VA - 5	Delete uploaded docs - 5	what's holding up claim process / problems - 5	View and download historical claims and decisions/letters/ appointments - 5	See appointments and schedule specialty care - 5	
Call VA about a claim - 4	Other real-time communication with specialist or provider - 4	Submit a question about a claim - 4	Upload claim or appeal supporting documents that were requested by the VA - 4	Change frequency of updates - 4	Searchable form library - 4 · Why decision made, in lay man terms, with its implications - 4
percentage rates for disabilities w/codes - 3	FAQ section - 3	virtual schedule and chat with VSO - 3	Call VA claim specialist about a claim - 3		
Add/remove/update dependents - 2	Claim decision - 2	Ask a question about a particular claim or appeal - 2	visual dashboard - 2	messaging service to providers/specialists - 2	
Acknowledgment of receipt of claim - 1	Email support - 1	Who is reviewing my claim or appeal (last names maybe) - 1	where claims were sent - 1	Appeal - see status of remand - where it was remanded to - 1	AI to answer questions (Clippy/Wizard style name) - 1

Summary & Next steps

Summary

The research indicates that users desire accurate timelines / time estimates for completion of their claim.
- Co-design session research indicated that users desired detailed time estimates for overall claim completion. (This was also found in the Competitive analysis.)

Users desire more detailed info on status/steps of what is happening with their claim
- Co-design sessions revealed that a top user feature was to have clear, defined steps as to where their claim was in the process. (This was also found in the Competitive analysis.)
- NCC research indicated that users wanted to view/print all documents related to their claim.
- NCC research indicated that users desired better verification of their actions on VA.gov.
    - E.g. Clearer confirmation that VA received users evidence/documents.

The research indicates that users would like clearer information and access to their decision letters
- NCC research states that users would like to view/print notification letters.
- Co-design sessions indicate that users highly prioritize the ability to view, download and print decision letters from within the tool.

Users desire relevant and efficient updates, and communication about any progress of their claim.
- Based upon the co-design sessions, users prioritized highly email and text updates for their claim.
    - This was also reflected in the Competitive analysis.

There are issues within the CST that needs to be further researched and resolved
- Users struggle to upload documents and see their claim status, or even see their claim in the tool.

Next steps

One of the reasons the Claim Status Tool was picked as a tool that could be valuable to update/improve, is that it is the absolute number one topic within the VA call center.

We need to understand what is behind the quant data from the call centers. Problem with tool? Lack of info? Lack of knowledge that the tool exists?

We will do an analysis of the specific content/topics within these calls. With this info and the info coming out of the research presented above, we will come with a set of specific recommendations for upcoming research and design for the Claim Status Tool.

Further steps / action items
- **Technical discovery / analysis of the current tool**
- **Business process discovery with the current tool**
- **Further quantitative and qualitative analysis of the current tool**
- **Stakeholder interviews and business goal perspectives**

End

Questions? Email: cvalla@governmentcio.com or kstachura@governmentcio.com