Profile: Notification Settings

Discovery Readout

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Background & Goals

Background

The VA is ramping up digital communications efforts, specifically through email and text. As a result, Veterans need to be able to manage and customize the communications they receive.

The VA Profile team has built communications permissions engine that will integrate with the VA.gov profile frontend, and allow veteran-managed settings to be saved and shared across systems at the VA.

Through this research, we wanted to learn about the Veteran mental model around notifications, and evaluate our proposed design for a notification settings section of the VA.gov profile.

Research Goals

Specifically, we wanted to find out:

○ What expectations do Veterans have about discovering, receiving, and managing notifications?

○ Does our solution enable Veterans to manage notifications without encountering UX hurdles, especially when their profile is missing contact information?

○ What kind of static content support might make sense for this section of profile?

○ **Bonus research:** We included one task to evaluate an approach we're considering to remedy an a11y issue related to removing contact information.

Methodology

Method

- 50-minute remote, moderated sessions over Zoom
- Warm-up interview, 5 tasks in a prototype, 2-3 post-task questions
- Iterated on prototype and conversation guide as sessions progressed
  - Made first task more general to avoid leading participants into a specific benefit category
  - Tested whether or not reversing the order of content alleviated confusion in one section of our prototype

GitHub Research Folder: plan, convo guide, and notes

Participants

We spoke to a diverse group of 9 Veterans:

- 3 women, 6 men
- Caucasian (4), Black or African American (3), American Indian or Alaska Native (2)
- Age ranged from from 34-74
- Live in urban (4) and rural (5) areas
- 2 participants had identified cognitive considerations of PTSD and/or TBI.
- Education level ranged from high school/GED or equivalent to Master's degree, with the most participants (3) having completed some college (no degree).
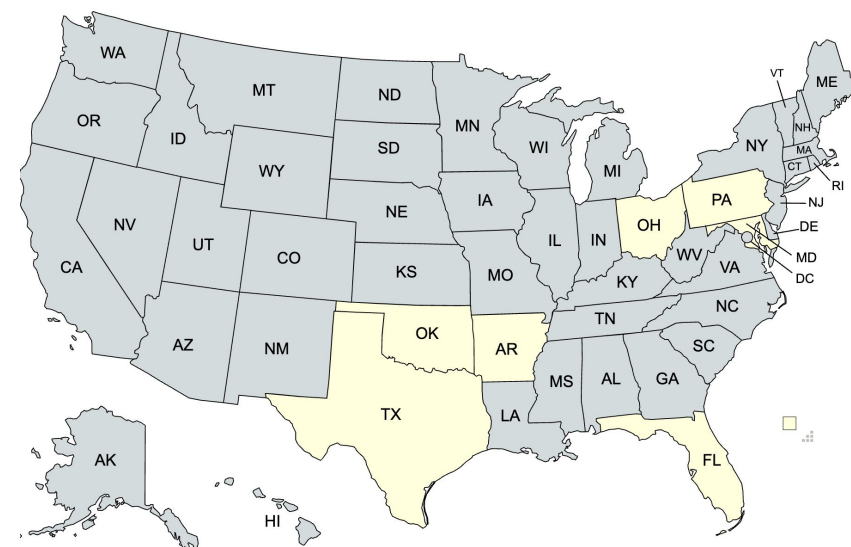
We spoke to Veterans living in Florida, Pennsylvania, Maryland, Arkansas, Oklahoma, Ohio and Texas

GitHub Research Folder: plan, convo guide, and notes

Marginalized groups we didn't speak with

This study may not meet the needs of the following marginalized Veteran groups:

- Veterans above the age of 55
- Veterans with cognitive disabilities
- Mobile users
- Assistive tech users
- Transgender Veterans
- Veterans living abroad

Category	Target	Study	1	2	3	4	5	6	7	8	9
Marginalized Group			MM/DD/YY								
Age 55-64+	50%	44%	0	1	1	1	0	1	0	0	0
Cog. Disability	50%	22%	1	0	0	0	0	0	0	1	0
Mobile user	50%	22%	1	0	0	0	1	0	0	0	0
People of color	30%	44%	1	0	0	0	1	0	1	1	0
Rural	25%	56%	0	1	1	1	0	1	0	1	0
No degree	25%	33%	0	1	1	1	0	0	0	0	0
Women	10%	33%	1	0	0	0	0	0	1	1	0
Assistive tech user	10%	0%	0	0	0	0	0	0	0	0	0
Native American	10%	22%	0	0	0	1	0	0	0	1	0
Transgender	10%	0%	0	0	0	0	0	0	0	0	0
Veterans abroad	10%	0%	0	0	0	0	0	0	0	0	0

Research Findings

Key Findings

1. It was not intuitive for participants to look in profile to manage notification settings, and most don't actively manage settings for notifications they currently receive.

2. Overall, our design provides a good solution for Veterans to manage notifications, but status messages and available notification channels were not clear to all participants.

3. Notification groups were clear to participants for the most part, but some wanted to see groups in a different order.

4. Some individual notification names would benefit from additional context.

5. Many participants expected they'd be able to get all notifications by email *and* text.

6. Leaving notification settings to add missing contact information caused confusion for participants.

7. 5 of 9 participants experienced concerns and confusion about their sign-in vs contact email address.

8. All participants easily understood how to remove contact information, but some wanted more information about the impacts of doing so.

9. Participants see value in notifications related to health care, claim status updates, applications-in-progress, and education benefits.

It was not intuitive for participants to look in profile to manage notification settings.

Six participants first looked on the homepage under various sections such as health care and records. We prompted them to see if there was anywhere else they would look; responses included **using site search**, **the contact us link**, and **My Health eVet (MHV)**.

Once guided to the profile menu options (My VA, My Health, Profile):

- 5 of 9 participants stated they would expect to find notification settings under My VA
- 2 said My Health
- 2 said Profile
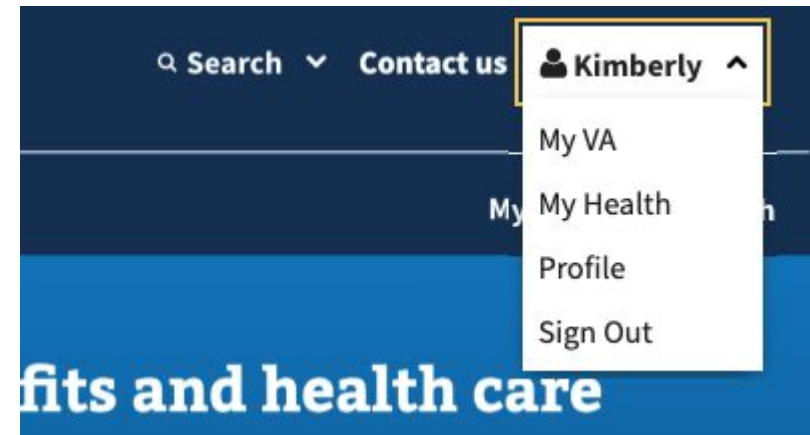
Part of the disconnect between profile and notification settings could be due to the fact that the **6 of 9 participants stated they don't update settings for notifications** they currently receive. One participant with TBI felt the concept of managing notifications was overwhelming.

Overall, our design provides a good solution for Veterans to manage notifications.

However, status messages and available notification channels were not clear to all participants.

What worked:

- Contact information at the top of the page was useful
- Veterans easily understood how the page was organized (groups + items)
- Veterans intuitively made changes to notification settings

What didn't:

- Status messages (though helpful) were hard to read
- It wasn't clear which channels were available for each notification

"I didn't really in the beginning, see the "off" there. I believe it was [because of the] lower case letters, not bolded or anything. I would do something there to enhance that so my eye would go to it." - P9

Applications, claims, decision reviews, and appeals

Board of Veterans' Appeals hearing reminder
Off   Edit

Reminders to finish in-progress applications
Notify by text: on

Benefit payments and debts

Scheduled payment updates   Edit
Notify by text: on

Notification groups were clear to participants for the most part, but some wanted to see groups in a different order.

- Participants correctly understood what notification group names meant.
- 4 said health care notifications are the most important.
- 3 wanted to see the "Your health care" group first.
- "Applications, claims, decision reviews, and appeals" group didn't matter to 2 participants.

"I already got my disability rating so I wouldn't need any applications or anything and since I have my rating, there is no need to appeal because I am at 100%. And do those two things [notifications within group]…I would skip right by this box." - P9

Applications, claims, decision reviews, and appeals

Reminders to finish in-progress applications
On: text

Board of Veterans' Appeals hearing reminder
Off

[Edit]

Benefit payments and debts

Scheduled payment updates
On: text

[Edit]

General VA information and updates

COVID-19 updates
Off

[Edit]

Your health care

Appointment reminders
Off

Prescription shipment and tracking updates
On: text

[Edit]

Some individual notification names would benefit from additional context.

Participants made some incorrect assumptions or weren't sure about a few notifications.

- 2 participants were unclear if text messages about active claims would be covered by either of the notifications in the "Applications, claims, decision reviews, and appeals group"
- 3 participants didn't know what kind of payments would be included in the "Scheduled payments and debts" notification.

Applications, claims, decision reviews, and appeals

Reminders to finish in-progress applications
On: text

[Edit]

Board of Veterans' Appeals hearing reminder
Off

Benefit payments and debts

Scheduled payment updates
On: text

[Edit]

General VA information and updates

COVID-19 updates
Off

[Edit]

Your health care

Appointment reminders
Off

[Edit]

Prescription shipment and tracking updates
On: text

Many participants expected they'd be able to get all notifications by email and text.

- Six participants expected to notifications to be available by both text and email.
- Didn't understand why they couldn't get a text message for a notification if their mobile number was on file.
- Didn't have a confident guess as to why that might be.

"That was not clear to me. I don't like that. If you are going to give me the option, give me the option - don't limit my options."

Leaving notification settings to add missing contact information caused confusion for participants.

According to data provided by VA Profile, about **50% of VA.gov profiles have a mobile number on file, and fewer than that have an email on file**. Keeping this in mind, we needed to account for users who are a missing contact email or mobile number.

All participants **understood content telling them they needed to add missing information**, but leaving the notification settings page to do so caused confusion and a lack of confidence that the task had been completed.

Only 3 of 9 participants were confident about how to complete the notification opt-in task after adding missing contact information.

Check out the prototype

"I have not a clue. Because all you've done is added your email, you don't know whether the notifications are coming or not."

5 of 9 participants experienced concerns and confusion about their sign-in vs contact email address.

When adding an email address:
- 3 participants hesitated
- Didn't understand difference between login and contact email addresses.
- Participants with cognitive considerations thought they had to leave VA.gov as part of the notification sign-up process

Contact email address

This is the email we'll use to contact you.

Your contact email may be different than the email you use to sign in. To view or update your sign in email, go to the website where you mange your account information.

Update sign in email address on ID.me

Contact email address   kimberly.smith@email.com   Edit   Remove

All participants easily understood how to remove contact information, but some wanted more information about the impacts of doing so

We tested adding a remove button next to edit buttons on the personal and contact information page.

- Remove button was clear to all participants
- Participants correctly chose the button they needed

"Does that mean I won't be able to log into VA.gov anymore?"

All participants easily understood how to remove contact information, but some wanted more information about the impacts of doing so

Participants expressed concerns suggesting the content in the modal is insufficient.

- What does "many VA records" mean?
- What is included under "some or all" VA notifications?

⚠ **Are you sure?**

- This will delete your email address across many VA records.
- You may no longer get some or all VA notifications by email.

You can always come back to your profile later if you want to add an email address again.

[Yes, remove my email address]   [Cancel]

Contact email address

This is the email we'll use to contact you.

Your contact email may be different than the email you use to sign in. To view or update your sign-in email, go to the website where you manage your account information.

Update sign-in email address on ID.me

Contact email address

Email Address (*Required)

kristietester@gmail.com

[Update] [Cancel]

Current state Remove contact email address

Contact email address

This is the email we'll use to contact you.

Your contact email may be different than the email you use to sign in. To view or update your sign in email, go to the website where you mange your account information.

Update sign in email address on ID.me

Proposed state

Contact email address kimberly.smith@email.com [Edit] [Remove]

Participants see value in notifications related to health care, claim status updates, applications-in-progress, and education benefits.

We asked participants about notifications they already receive, or would want to receive from VA. They named:

- Appointment reminders
- Notifications that their doctor sent a secure message (text **and** email)
- COVID updates
- Claim appeal status updates
- Newsletters (from local and federal VA)
- Education stipend payments
- Prescription shipment notifications *including the name of the medication*
- Notification before someone from the VA calls and requests personal information over the phone.

Multiple participants were excited about reminders about in progress applications.

Recommendations

Key Recommendations

1. Make it easy for Veterans to manage notifications throughout their VA journey, not only in their profile.

2. Provide a way for Veterans to update their contact information without having to go to a new page.

3. Consider making all notifications available by text and email.

4. Revisit the design for status messages and surfacing the channels through which Veterans can receive notifications.

5. Revisit the page IA to explore how we might better align with Veteran priorities.

6. Update profile content to improve clarity and comprehension.

7. Revisit the design and content around login and contact email addresses.

8. Move forward with moving remove functionality to the read mode of personal and contact information page.

9. Consider adding notifications participants mentioned to future versions of our notification engine.

Recommendations

Make it easy for Veterans to manage notifications throughout their VA journey.

Is profile the best place to put notification settings?

Let's explore how we can make it more intuitive for Veterans to turn notifications on or off. Some ideas for consideration:

- Create a first-time onboarding experience to introduce this new feature
- Creating a separate section outside of profile (perhaps "Settings" or combining with action items)
- Surfacing notifications in My VA
- Highlighting notifications on the personal and contact information page
- creating a landing page to support Veterans who resort to search
- Allow for management at the notification level
- Allow for opt-in at the point of discovery
- Make it easy for Veterans to discover notifications at relevant touch points

Recommendations

Provide a way for Veterans to update their contact information without having to go to a new page.

We can improve the UX of our solution if we allow people to update their email address and mobile number directly on the notification settings page.

- Minimize confusion
- Increase task completion rate
- Increase profile completeness

We may be able to leverage our modal solution without grossly expanding the scope of our MVP.

Recommendations

Consider making all notifications available by text and email, and adding notifications participants mentioned to future releases.

Participants expect to be able to get notifications by the channel that works best for them, and shared valuable insights about notifications that would be useful. Teams that are sending notifications through VA Profile should consider:

- Making notifications available by text and email
- Adding notifications participants mentioned to the communication preferences engine (such as changes about education stipend payments, and claim status updates)
- Updating notifications to include additional relevant information (such as the medication name when confirming prescription shipments)

Additional research to build a more in-depth understanding around Veteran expectations and preferences for notifications would be useful to guide decisions in this area.

If we can't make notifications available by all channels, we need to be more specific about which notification channels are available. We may also need to provide information about why some notifications have one channel and others have a different option.

Recommendations

Revisit the design for status messages and surfacing the channels through which Veterans can receive notifications.

Let's explore how we can make the status messages and available channels more clear, while maintaining the clean, uncluttered UI participants positively responded to.

- Revisit typography
- Revisit content

Recommendations

Revisit the page IA to explore how we might better align with Veteran priorities.

We should collaborate with our IA experts to ensure we're aligning with Veteran priorities and IA throughout VA.gov.

- Alphabetical order wasn't particularly useful
- Applications, claims, decision reviews and appeals isn't relevant to Veterans who long-established benefits with the VA
- Health care is a priority for Veterans

Recommendations

Update profile content to improve clarity and comprehension.

Our prototype revealed a few opportunities to improve clarity through content:

- Provide more context about individual notifications.
- Make content inside the remove contact info confirmation more explicit
- This was previously mentioned, but bears repeating: we can be more specific about which notification channels are available, or offer some information about why some have one channel and others do not.

Recommendations

Revisit the design and content around login and contact email addresses.

This was an unexpected and major point of confusion for participants in our study. We already tried:

- Reversing the order
- Adding a small heading

We need to further refine the approach and see how we can make the distinction between these two email addresses.

Current:

Contact email address		
This is the email we'll use to contact you.		
Your contact email may be different than the email you use to sign in. To view or update your sign in email, go to the website where you mange your account information.		
Update sign in email address on ID.me		
Contact email address	kimberly.smith@email.com	Edit Remove

Possible solution:

Email addresses		
Sign in email address	kimberly.washington.smith@gmail.com	Update on ID.me
Contact email address	Edit your profile to add a contact email address.	Edit

Recommendations

Move forward with moving remove functionality to the read mode of personal and contact information page.

The current button design options aren't ideal - but they worked.

- Adding a remove button next to edit on the personal and contact information page made it easy for participants to understand how to remove contact information.
- No one got confused or mistakenly chose the wrong button.

We should move forward with our plans to update this pattern in profile.

Next Steps

Next steps: notification settings

Share findings and recommendations with VA Profile and VA Notify teams so they're aware of what we've learned.

We don't have the expectation that all the notifications participants mentioned in our study will become available, or that in the short term we can make any notification available by any channel.

Develop an approach to orienting users to this new capability.

Our research shows profile may not be the first place Veterans look to manage notification settings. We need to determine how to best introduce this new feature on VA.gov to Veterans so they manage their settings. An onboarding approach may also be effective in helping Veterans understand the channels through which notifications are available.

Next steps: notification settings

Consult with IA on the order of notification groups.

Based on what we heard in this study, we should follow up on [IA feedback in our midpoint review](#) to consider ordering groups by importance/prevalence.

Revisit the design for status messages and notification channels

Explore ways to improve clarity and comprehension for notification status messages, and the channels through which Veterans can receive notifications. We'll work with our content team to ensure alignment on VA voice and tone.

Next steps: other areas of authenticated experience

Move forward with changes to remove button in personal and contact information.
Design will update documentation and mock-ups for this for FE implementation.

Revisit how we are presenting login vs contact email address.
Explore ways to improve clarity and comprehension for the difference between login and contact email address, through both design and content. This is is separate (and important) work from notification settings.

Evaluate how notifications overlap with action items.
Our team is currently in the process of adding action items to My VA. Now that we've learned more about Veterans experience and expectations around notifications, we should regroup to see where there is overlap (if any).

Post launch

Explore how we might enable Veterans to edit contact information within notification settings.
We have an existing modal solution, but don't think that offers the most intuitive or accessible UX for notification settings. We'll explore how we might allow Veterans to edit in place, while considering other uses cases on VA.gov that could help make this a reusable component.

Appendix

Resources

- [MVP definition](#)
- [Research plan](#)
- [Convo Guide](#)
- [Prototype](#)
- Synthesis: [Notes](#) and [affinity map](#)
- Additional decks: [Sprint demo](#)