

VETERAN FACING SERVICES – DIGITAL HEALTH MODERNIZATION

# 1095-B Sprint 2 Design Review

Click to add text

2/17/2022

# Agenda

- 01 Research
- 02 Wireframes
- 03 Cover letter

# Round 1 Research Overview

- 10 45-minute research sessions with Veterans scheduled
  - After no shows and cancellations, we completed **6 full sessions successfully meeting our minimum.**
  - A 7th session was conducted, but shortened and modified to meet participant capabilities.
- 3 Parts of the session included:
  - 15 minute interview, 20 minute usability test with prototype of proposed solution, 10 minute VA.gov wayfinding activity
- Research Goals
  - Better understand how Veterans might find, use, and edit a digital copy of the 1095b form
  - Discover needs, pain points and preferences for physical or digital delivery of the form
  - Test usability of proposed solution
- Full research findings report in progress, will be delivered for Sprint 2

# Round 1 Research Prototype

- Design and content was well received, clear and easy to use
- The main flow from sign in to download was well understood, participants found the download CTA quickly
- Method to fix errors with the 1095-B PDF was clear
  - Participants generally saw the FAQ question and associated telephone number regarding incorrect information, before they opened the actual 1095-B form. This was likely due to it being a usability test, and not indicative of real world behavior.
  - Keeping directions with how to fix information near the download CTA is likely important going forward
  - 2 participants mentioned selecting the “contact us” CTA in the header, all (except 1? Confirm numbers) would have preferred emailing or using a tool to make a correction for wrong data on the form

# Round 1 Research Themes 1/2

- Recall and recognition
  - 6/7 participants recalled getting the 1095-B form in the mail from the VA when explained in the context of it being “proof of health insurance” or “health coverage” form.
  - Many explained that when they got in the mail, they filed it away for safe keeping until it was time for them to file their taxes or send their files to a tax preparer. Some made electronic copies of the paper form for easier access or the ability to use it on their computer during tax preparation.
- Digital vs Physical Delivery
  - 5/7 participants preferred digital delivery. The remaining 2 participants, who were older, were comfortable with digital but preferred paper due to a sense of security and ease
  - Reasons cited for preferring digital were: ease of use / less hassle than paper, ability to organize, and environmental benefits of saving paper
- Paperless Delivery Option
  - A second version of the authenticated download screen was shown with an option to sign up for paperless delivery.
  - Version shown was to test concept, not execution
  - Participants generally liked the ability to sign up for paperless delivery, with many of the same reasons cited as preferring digital download
  - We didn't test larger, complex issues connected with paperless delivery: whether setting it at an individual page level vs profile/preferences level, how paperless delivery should be managed across all VA documents or in relation to email, SMS and other notification preferences.

# Round 1 Research Themes 2/2

- Nobody wants to make a call
  - Expectation that there would be a long wait if they needed to call to update the form. One participant compared calling government offices to having to call the cable company (include quote)
  - Digital is seen as an opportunity to avoid the hassle, with an expectation they could update the form via messaging or online tool
  - One participant admitted that if only their address was wrong, they wouldn't bother calling to update it. My assumption is this would be more common under real world conditions outside of usability testing.
  - Future Ideas to consider (to update in user stories and added to backlog)
    - Action link to profile with addresses listed with the VA, including enrollment system, and link to change it
    - Possibility of changing IVR system: automated way to request paper copy? Ability to update address without needing to speak to a rep?
- Finding the form on VA.gov
  - When prompted to go to VA.gov and think through where they might look for this form:
  - (CONFIRM NUMBERS) Participants generally scrolled to the homepage jump links section
  - Most looked under records first
  - (CONFIRM NUMBERS) 2/6 thought "Health Care" would be appropriate
  - (CONFIRM NUMBERS) Only 1 or 2 participants mentioned or looked at the header navigation without prompting
  - While one participant remarked they would search for it initially, few mentioned search as an alternative method for finding it.

# Round 1 Research Themes Under Consideration

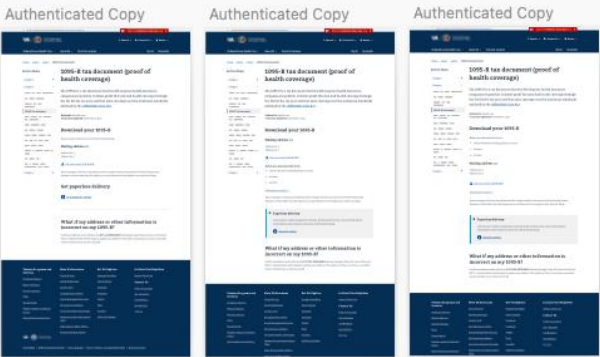
- Is this document required or nice to have?
- Impact of wrong address on enrollment system if digital first delivery

# Wireframes Process

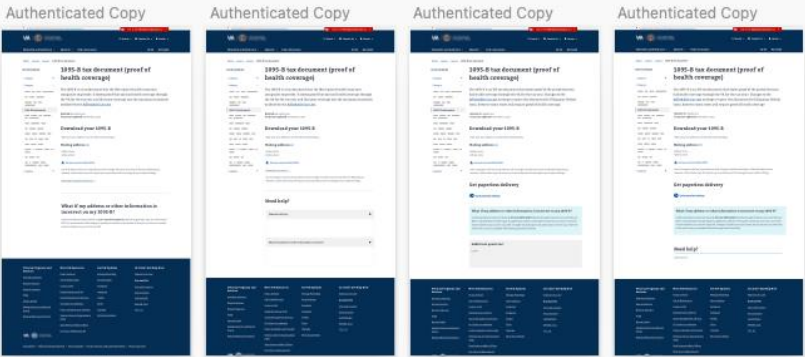
## Wireframes Explorations

### Download & Paperless explorations

- Address
- Tax return
- Action link

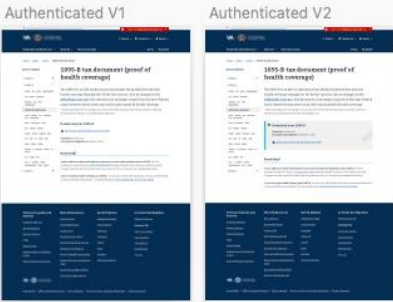


### Need Help explorations



## Wireframes 2/17/22

### Authenticated



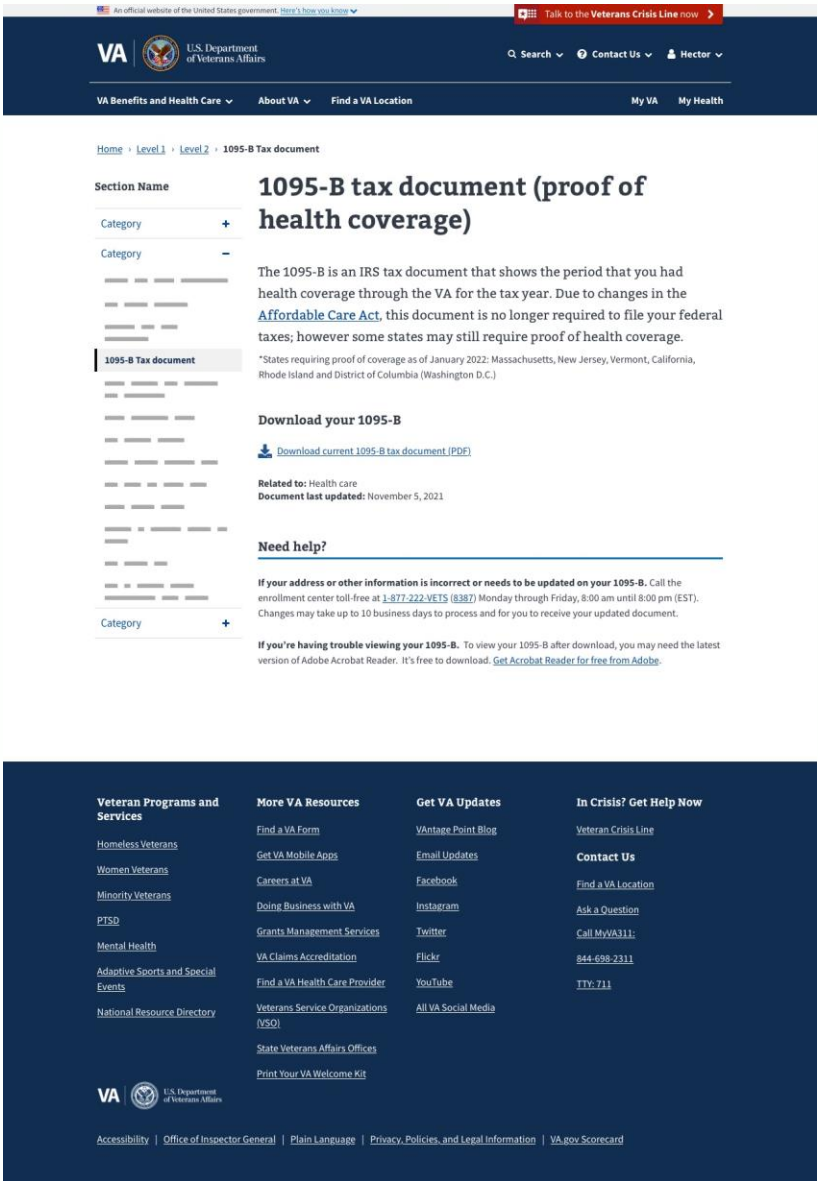
### Unauthenticated



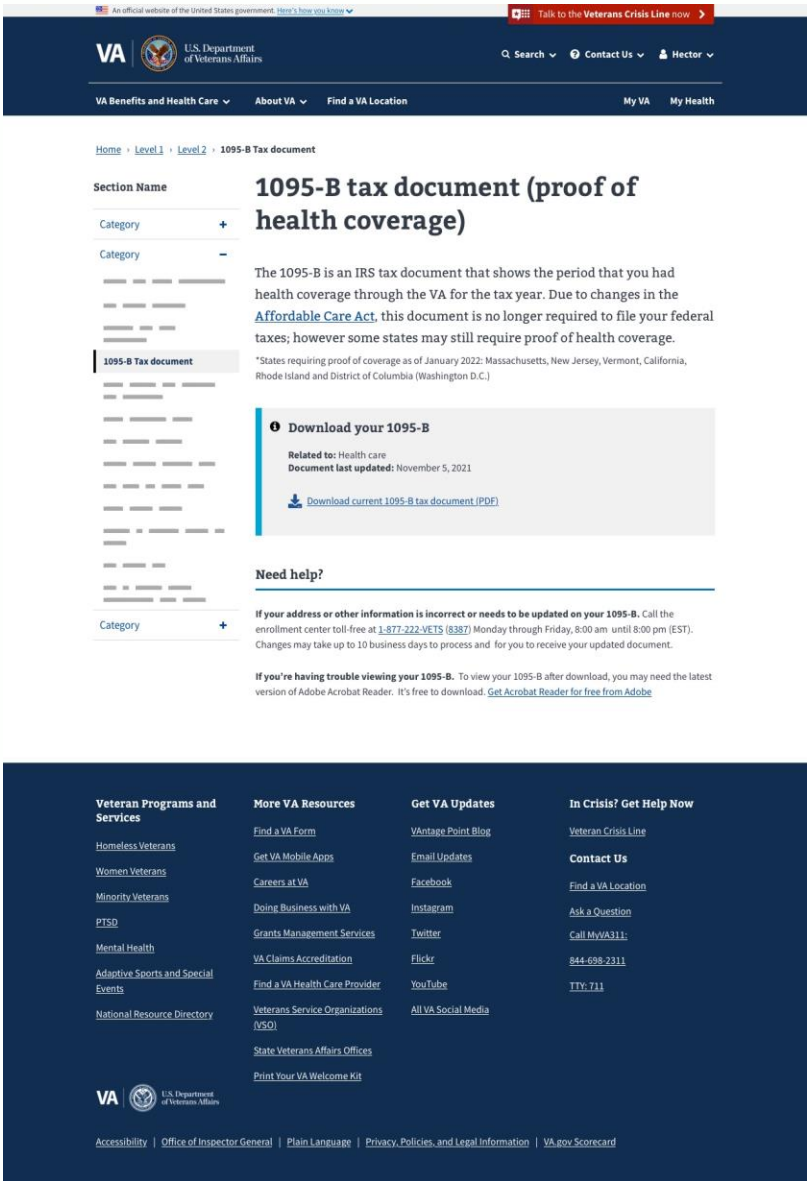
[Box file link](#)



# Proposed “safe” version




# Exploration version



# Cover letter

## Previous

VA



U.S. Department of Veterans Affairs

Veterans Health Administration

<Date Printed>

<VPID>  
<First Name> <Middle Name or Middle Initial> <Last Name><, Suffix>  
<Address 1>  
<Address 2>  
<Address 3>  
<City> <State>, <Zip>

<FIRST NAME> <LAST NAME>,

**Please keep this letter and the enclosed tax form for your 2021 tax records.**

The Affordable Care Act (ACA) requires the Department of Veterans Affairs (VA) to notify enrolled Veterans of their period of health care coverage during the previous calendar year. The law also requires VA to provide this notification to the Internal Revenue Service (IRS).

Enclosed you will find your IRS Form 1095-B, which documents your VA health care period of coverage during the year 2021. No additional steps need to be taken with this form; just follow the IRS instruction, as applicable, for completing your Health Care Individual Responsibility information on your tax return form.

**What You Need to Know**  
Enrollment in VA health care satisfies the ACA's health care coverage requirement.

**Where Can You Get More Information**  
If you have any questions, call us toll-free at 1-877-222-VETS (8387) Monday through Friday, 8:00 am until 8:00 pm (EST). You may also find additional information regarding the ACA on VA's website at [www.va.gov/health-care/about-affordable-care-act/](http://www.va.gov/health-care/about-affordable-care-act/). For more information regarding the ACA's tax implications, visit [www.irs.gov/Affordable-Care-Act/Individuals-and-Families](http://www.irs.gov/Affordable-Care-Act/Individuals-and-Families).

Thank you for your service to our Nation.


Sincerely,

Director, Health Eligibility Center  
VHA Member Services

702-800A  
Nov 2021

## Revised

VA



U.S. Department of Veterans Affairs

Veterans Health Administration

<Date Printed>

<VPID>  
<First Name> <Middle Name or Middle Initial> <Last Name><, Suffix>  
<Address 1>  
<Address 2>  
<Address 3>  
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<FIRST NAME> <LAST NAME>,

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**Download this Document Online**  
Get a digital copy of your 1095-B at <1095-B download URL>.

**Get Help and More Information**  
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# Cover letter (current)

- Streamlined terminology, updating references of "form" to "document"
- Highlighted updates in law that impact what this form is needed for / what Veterans need to do with it
- Added callout for digital download, with link
- Updated "More Information" sub-header to be more actional and inclusive of help. Also, in body called out "enrollment center" to clarify VA department

VA



U.S. Department of Veterans Affairs

Veterans Health Administration

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