

Check-in: identity verification and multiple appointments

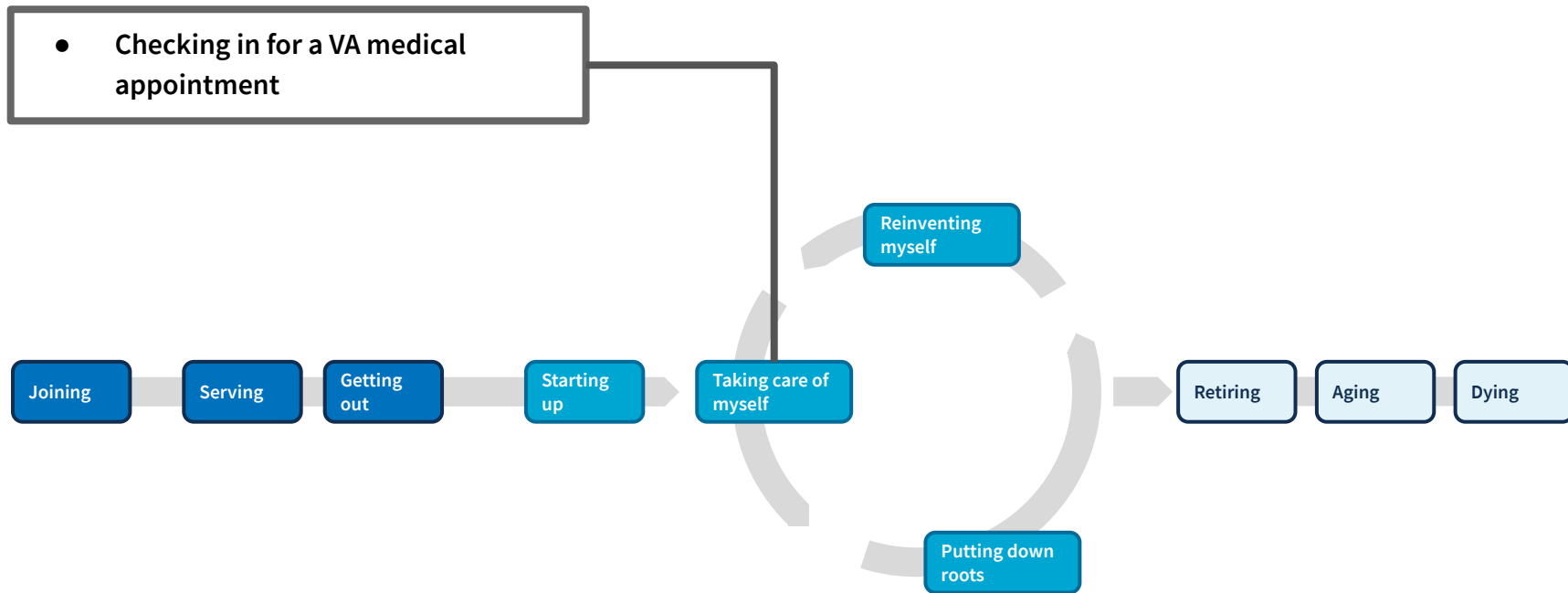
Usability findings



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How this research maps to the Veteran journey

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For a fully detailed Veteran journey, go to

<https://github.com/departement-of-veterans-affairs/va.gov-team/blob/master/platform/design/va-product-journey-maps/Veteran%20Journey%20Map.pdf>

Serving and separation

Living civilian life

Retiring and aging

VA



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OCTO-DE goals that this research supports

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Supported

Not supported

Veterans and their families can apply for all benefits online

Veterans and their families can find a single, authoritative source of information

Veterans and their families trust the security, accuracy, and relevancy of VA.gov

Veterans can manage their health services online

VFS teams can build and deploy high-quality products for Veterans on the Platform

Logged-in users have a personalized experience, with relevant and time-saving features

Logged-in users can update their personal information easily and instantly

Logged-in users can easily track applications, claims, or appeals online

Measures to increase

Completion rate of online transactions

Percent of applications submitted online (vs. paper)

Veteran satisfaction with VA.gov Benefit use and enrollment, across all business lines

Benefit value (in \$) delivered from online applications or transactions

Number of VA.gov users as a function of total Veteran population

Usage of digital, self-service tools

Measures to decrease

Time to successful complete and submit online transactions

Time to process online applications (vs. paper)

Call center volume, wait time, and time to resolution

Time from online benefit discovery to benefit delivery

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Background & Goals

Background

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This product is reimagining the ecosystem that allows a Veteran to check-in for a medical appointment. The healthcare experience team in particular will be creating the portion of the ecosystem that enables a Veteran to utilize their mobile device to check-in (letting the VA know that they have arrived for their appointment) via va.gov.

With this round of research, we are looking to test the usability and design of our proposed phase 2 features:

- the addition of last name and last 4 of SSN as identity verification data points.
- the ability for Veterans to check-in if they have multiple appointments in one day.
- showing a check-in status for each appointment.

In prior research, half of the Veterans were concerned that check-in only utilized their phone number to verify they were the right person checking in. We also found out that last name and last 4 digits of SSN were commonly asked to verify identity within current check-in workflows.

We analyzed appointment data (particularly looking at our proposed pilot site in Martinsburg WV) and found over half of Veterans have more than one appointment on any given day. With our MVP scope, those Veterans would not be able to complete check-in. We want to rectify that in Phase 2.

Research questions

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- Does the addition of last name and last 4 of SSN help the Veterans feel more secure about utilizing this check-in solution?
- Do Veterans understand how to check-in for 1 appointment via their mobile device when they have multiple appointments in one day?
- Do Veterans find value in seeing an itinerary of all their appointments for the day?
- Is the information provided in said itinerary sufficient, too much, or too little?
 - Particularly, are Veterans interested in seeing appointments that are past the time where they can check-in?
- Do the actions on the itinerary page align with Veteran expectations? Are there things that Veterans expect to be able to do from an itinerary page that they aren't able to do?
- Are the check-in appointment statuses helpful to Veterans?
- Would Veterans find repeating this process multiple times per day (for each appointment if they had multiple appts) burdensome or easy?



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Hypotheses to be tested

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- The additional identity verification data points help alleviate some of the earlier security concerns that we heard from Veterans.
- Adding the capability to check in for multiple appointments throughout the day will not impact a Veterans ability to complete check-in for an individual appointment.
- The combination of a daily itinerary and statuses for each appointment will help provide clarity to the Veteran throughout their day at the medical facility.
- The Veteran might have additional expectations on what they could see or do on the itinerary, such as check-in for all their appointments for the day at once.
- Veterans might not initially understand why they have to repeat this process multiple times per day.



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Methodology

Method and detailed research questions


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We conducted 9 remote moderated tests via Zoom using the Perigean contract. The Veterans provided feedback using a poster, Twilio, and interactive UXPin prototype. They employed the laptop hugging method to enable easier transition and observations from the poster to text portion of the workflow. The complete conversation guide can be found on the [VA's GitHub](#).

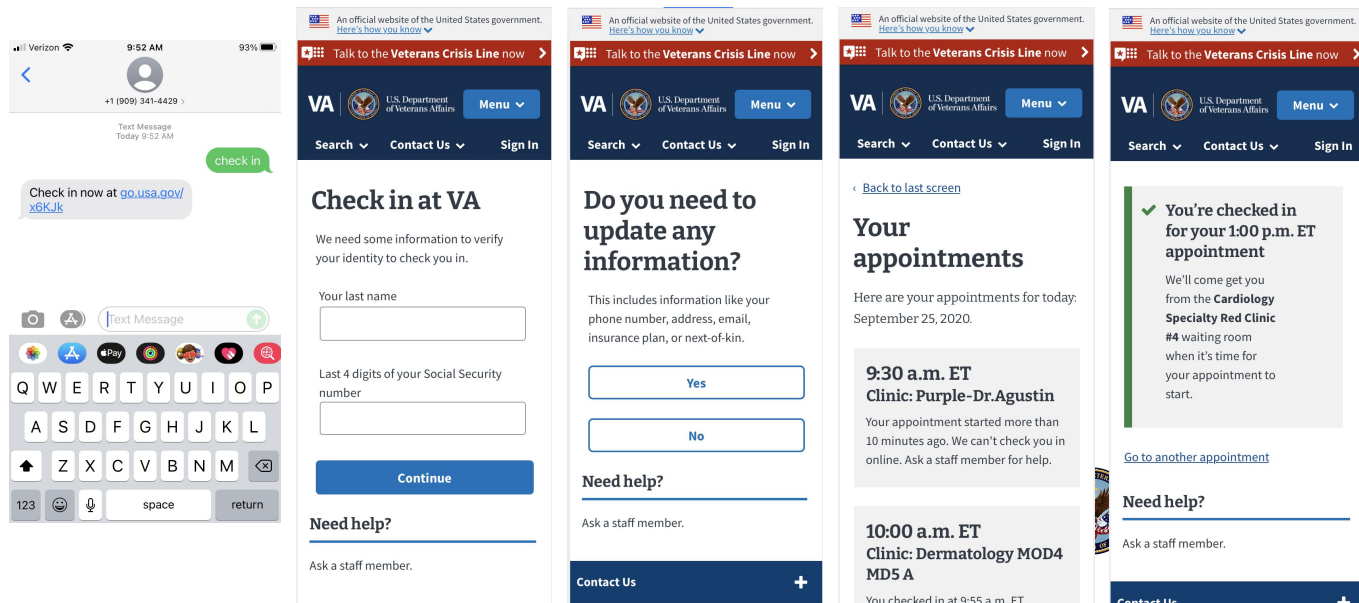
Use your phone to check in for your appointment

Need to update your insurance, contact, or other information? Check in with a staff member instead.

To start, text **check in** to **909-341-4429** or scan this code.



Data charges may apply.



The sequence of screens illustrates the check-in process:

- Text Message Interface:** A text message from the VA with a "check in" button and a link to go.usa.gov/xGKJk.
- Check in at VA:** A form titled "Check in at VA" with the instruction "We need some information to verify your identity to check you in." It includes fields for "Your last name" and "Last 4 digits of your Social Security number", and a "Continue" button.
- Do you need to update any information?:** A screen asking "Do you need to update any information?" with the instruction "This includes information like your phone number, address, email, insurance plan, or next-of-kin." It has "Yes" and "No" buttons.
- Your appointments:** A screen titled "Your appointments" with a "Back to last screen" link. It shows "Here are your appointments for today: September 25, 2020." and lists a 9:30 a.m. ET appointment at Purple-Dr. Agustin.
- Appointment Confirmation:** A screen confirming the 9:30 a.m. ET appointment at Purple-Dr. Agustin, stating "Your appointment started more than 10 minutes ago. We can't check you in online. Ask a staff member for help." It includes a "Go to another appointment" link.
- Next Appointment:** A screen showing the next appointment at 10:00 a.m. ET at Dermatology MOD4 MD5 A, with the instruction "You checked in at 9:55 a.m. ET." It includes a "Need help?" section with the instruction "Ask a staff member."

Participant Demographics

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We spoke to 9 Veterans, who

- have a smartphone (4 iOS and 5 Android).
- currently use VA health care.
- had an in-person medical appointment at a VA facility within the last 2 years.
- had a variety of current check-in preferences:
 - 3 preferred the kiosk
 - 2 preferred to talk to staff members.
 - 4 had no preference between kiosk and staff.

| Check-in: identity verification and multiple appointments usability | | | | | | | | | | | | | | | | | | | | |
|---|--------|--------|---------|---------------|---|---|---|---|---|---|---|---------------|----|----|----|----|----|----|---|--|
| # of participants | | 9 | | # of AT users | | | | | | | 0 | # of no shows | | | | | | | 6 | |
| Category | % | Target | Study | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | | |
| Veterans | | | | | | | | | | | | | | | | | | | | |
| Based on current VA statistics | | | | | | | | | | | | | | | | | | | | |
| Age 55-64+ | 50.00% | 5 | 5 | 1 | 1 | 0 | N | 0 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | N | 0 | 1 | | |
| Cognitive Disability | 50.00% | 5 | 3 | 0 | 0 | 0 | 0 | N | 0 | | 1 | 0 | 0 | 0 | N | 0 | 1 | 1 | | |
| Mobile user | 50.00% | 5 | 9 | 1 | 1 | N | N | N | 1 | 1 | 1 | N | 1 | 1 | N | N | 1 | 1 | | |
| Rural | 25.00% | 3 | 6 | 1 | 1 | N | N | N | 1 | 1 | 0 | 0 | 0 | 1 | 0 | N | 1 | 0 | | |
| No degree | 25.00% | 3 | 5 | 1 | 1 | N | N | 0 | 0 | 1 | 1 | N | 0 | 0 | 0 | N | 0 | 1 | | |
| Other than honorable | 21.00% | 2 | unknown | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Immigrant origin | 17.00% | 2 | unknown | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Women | 10.00% | 1 | 3 | 0 | 0 | 0 | N | 0 | 1 | 0 | 0 | 0 | 0 | 1 | 1 | 0 | N | 0 | | |
| Expat (living abroad) | 0.40% | 1 | unknown | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| | | | | | | | | | | | | | | | | | | | | |
| Race | | | | | | | | | | | | | | | | | | | | |
| Based on VA's projected statistics | | | | | | | | | | | | | | | | | | | | |
| Black | 15.00% | 2 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Hispanic | 12.00% | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Biracial | 3.90% | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Asian | 3.00% | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Native | 0.30% | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| | | | | | | | | | | | | | | | | | | | | |
| LGBTQ+ | | | | | | | | | | | | | | | | | | | | |
| LGBTQ+ Veterans are 5 times as likely to have PTSD | | | | | | | | | | | | | | | | | | | | |
| Gay, lesbian, or bisexual | --% | 1 | unknown | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Transgender | --% | 1 | unknown | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Nonbinary, gender fluid, ge | --% | 1 | unknown | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | | |



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Research findings

Key findings

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1. For most Veterans with smartphones, this implementation of online check-in was usable and well received.
2. Seven out of nine participants had trouble creating the text message after reviewing the poster.
3. Making sure the wording and link looked like it came from VA helped Veterans to trust it and be more prone to click on it.
4. Adding last name and last four digits of Social Security alleviated Veteran security concerns.
5. Veterans want to be able to update their contact information with this check-in workflow; however, they accept the current workflow with the question “Do you need to update any information?” and directions to talk to staff to complete updates.
6. Seeing a list of all the day’s appointments is valuable to Veterans.
7. Seeing check-in statuses for each appointment is valuable to Veterans.
8. More research is needed to determine if telemedicine appointments should be included or connected to the online check-in experience.



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Key findings

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9. Most Veterans would go to a staff member at the clinic if they had any questions while completing check-in.
10. MyHealtheVet and VA mobile app users understood why this check-in appointment list existed and was different from their other appointment lists.
11. Most Veterans understand why they can only check-in for one appointment at a time, but their expected starting point to check-in for their second appointment varied from the appointment list to the poster.



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For most Veterans with smartphones, this implementation of online check-in was usable and well received.

"[I'm] really in favor of this."

"It worked fast. I was surprised with what it did. I was a little impressed. It's not bad at all; I thought it would be cumbersome...It would work for the majority. But in cases with handicap people or individuals that aren't computer savvy, it would freak them out. I have seen people get frustrated."



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Seven out of nine participants had trouble creating the text message after reviewing the poster.

Participants used several methods to craft the text message:

1. Five participants attempted to scan the QR code.
 - a. One participant was successful without guidance from the moderator.
 - b. Four participants had trouble scanning and required guidance from the moderator to be successful. Three were iOS users and one was an Android user. The different scanners led to different workflows; some led to user confusion. For instance, one participant's QR scanner asked them to download something resulting in confusion, so the researcher directed them to use their camera to scan the QR code.
2. One participant successfully started by creating a new text message.
3. Three participants tried to call the phone number.
 - a. Our new hypothesis is that this may be due to using a full phone number for the test and not a short code like will exist in production.

Use your phone to check in for your appointment

Need to update your insurance,
contact, or other information?
Check in with a staff member instead.



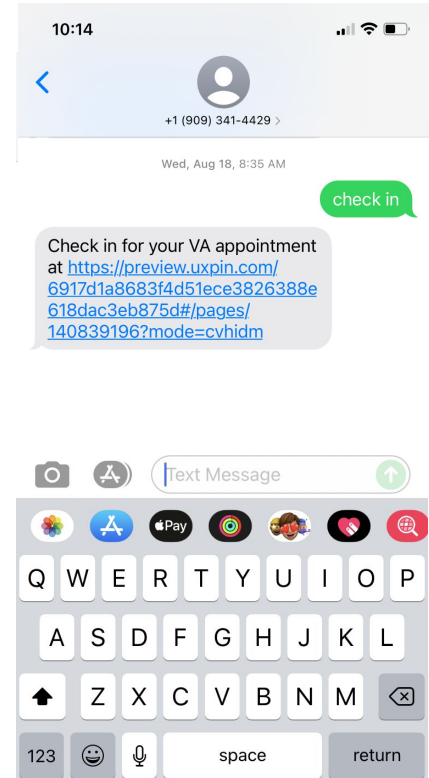
Data charges may apply.

Making sure the wording and link looked like it came from VA helped Veterans to trust it and be more prone to click on it.

"It says check in for the VA appointment. This wouldn't be an issue for me, because I know where I got the text from. There's a lot of awareness that you shouldn't click on anything on your phone."

- Three participants had similar comments to the one above. The other participants had no comments or complaints about this step in the workflow at all.
- This confirms that the changes made after the last usability study were correct and built Veterans' trust in the link.

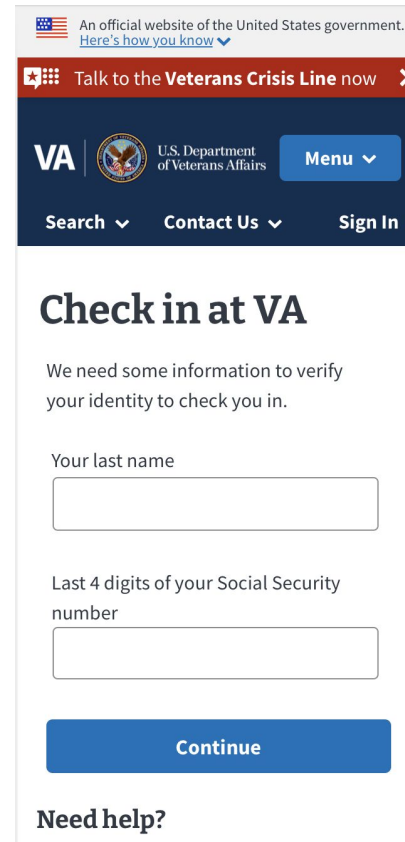
*Link URL due to prototype.
Actual URL is go.usa.gov link.*



Adding last name and last four digits of Social Security alleviated Veteran security concerns.

"It is basically the same information that you give someone when you are checking in with an individual. It is nothing different than doing that."

- Unlike previous studies, no participant expressed concern on how we were identifying them.
 - All participants commented that last name and last four were expected and appropriate when checking in.
 - Last four was preferred by all participants over entering their date of birth.
 - However, most participants felt similar to this participant, "Adding date of birth would be ok."



The screenshot shows the top portion of the VA's 'Check in at VA' webpage. At the top, there is a header with the U.S. flag, the text 'An official website of the United States government.', and a link 'Here's how you know'. Below this is a red banner that says 'Talk to the Veterans Crisis Line now' with a phone icon and a right arrow. The main navigation bar is dark blue and contains the VA logo, the text 'U.S. Department of Veterans Affairs', a 'Menu' button with a dropdown arrow, and three links: 'Search', 'Contact Us', and 'Sign In', each with a dropdown arrow. The main content area has the heading 'Check in at VA' in bold. Below the heading, it says 'We need some information to verify your identity to check you in.' There are two input fields: 'Your last name' and 'Last 4 digits of your Social Security number'. At the bottom of the form is a blue 'Continue' button. Below the button is a link for 'Need help?'.

An official website of the United States government.
[Here's how you know](#)

Talk to the **Veterans Crisis Line** now >

VA | U.S. Department of Veterans Affairs **Menu** ▾

Search ▾ **Contact Us** ▾ **Sign In**

Check in at VA

We need some information to verify your identity to check you in.

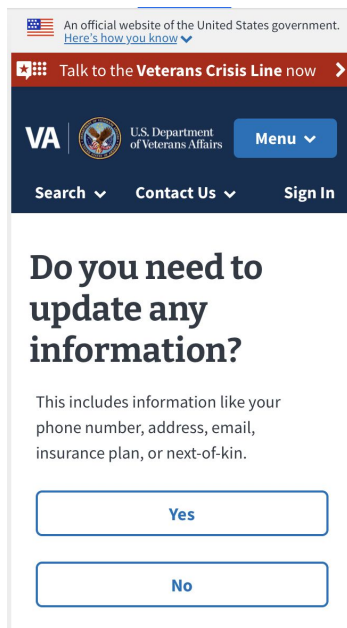
Your last name

Last 4 digits of your Social Security number

Continue

Need help?

Veterans want to be able to update their contact information within this check-in workflow; however, they accept the current workflow with the question “Do you need to update any information?” and directions to talk to staff to complete updates.



The screenshot shows the top of the VA website with the header "An official website of the United States government." and a link "Here's how you know". Below the header is a red banner that says "Talk to the Veterans Crisis Line now". The main navigation bar includes the VA logo, "U.S. Department of Veterans Affairs", a "Menu" button, and links for "Search", "Contact Us", and "Sign In". The main content area displays the survey question: "Do you need to update any information?". Below the question is a subtext: "This includes information like your phone number, address, email, insurance plan, or next-of-kin." At the bottom of the form are two buttons: "Yes" and "No".

An official website of the United States government.
[Here's how you know](#)

Talk to the **Veterans Crisis Line** now

VA | U.S. Department of Veterans Affairs | [Menu](#)

[Search](#) | [Contact Us](#) | [Sign In](#)

Do you need to update any information?

This includes information like your phone number, address, email, insurance plan, or next-of-kin.

[Yes](#)

[No](#)

These two quotes summarize the feedback received from all participants:

- "Well I would think it would be online like it is with everything else."
- "That seems reasonable." - in response to the current workflow.

Seeing a list of all the day's appointments is valuable to Veterans.

- All participants commented that they liked seeing a list of all their appointments for the day.
- Other suggestions made by Veterans when reviewing this page were:
 - The ability to refer to this list of appointments throughout the day.
 - The addition of room and floor numbers for each appointment.

The screenshot shows the top navigation bar of the VA website, including the American flag, a link to the official website, and a red banner for the Veterans Crisis Line. Below the navigation bar is the VA logo and the U.S. Department of Veterans Affairs name, along with a menu button. The main content area has a link to 'Back to last screen' and a heading 'Your appointments'. Below the heading, it states 'Here are your appointments for today: September 25, 2020.' and lists two appointments: '9:30 a.m. ET Clinic: Purple-Dr.Agustin' and '10:00 a.m. ET Clinic: Dermatology MOD4 MD5 A'. The first appointment has a message: 'Your appointment started more than 10 minutes ago. We can't check you in online. Ask a staff member for help.' The second appointment has a message: 'You checked in at 9:55 a.m. ET.'

An official website of the United States government.
[Here's how you know](#)

Talk to the **Veterans Crisis Line** now

VA | U.S. Department of Veterans Affairs **Menu**

Search **Contact Us** **Sign In**

[Back to last screen](#)

Your appointments

Here are your appointments for today:
September 25, 2020.

9:30 a.m. ET
Clinic: Purple-Dr.Agustin

Your appointment started more than 10 minutes ago. We can't check you in online. Ask a staff member for help.

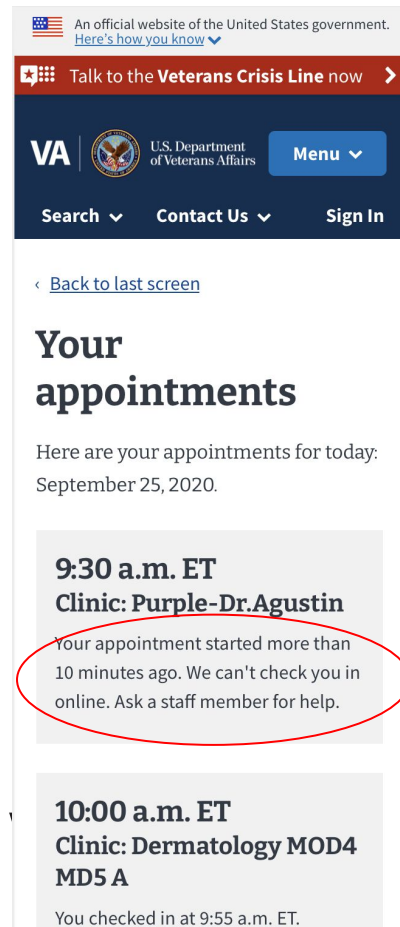
10:00 a.m. ET
Clinic: Dermatology MOD4 MD5 A

You checked in at 9:55 a.m. ET.

Seeing check-in statuses for each appointment is valuable to Veterans.

“The little instructions that are under the appointment are super valuable, because you can plan the time better.”

- All but one Veteran found all of the following statuses helpful:
 - This appointment is past the time period for online check-in.
 - You already checked in for this appointment.
 - You can check in now for this appointment.
 - It is too early to check in for this appointment. Try again later.
 - Online check-in isn't available for this appointment.
 - Multiple Veterans were concerned that we used the term “ineligible” to describe this status.
- The one Veteran didn't want to see any appointment that they were too late to use mobile check-in.



More research is needed to determine if telemedicine appointments should be included or connected to the online check-in experience.

- When eliciting initial interest in displaying telemedicine appointments within the online check-in experience, there was no consensus among the participants.
 - Participants ranged from “Yes, absolutely” and “I don’t see why not” to “Not sure” and “I don’t think so.”



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Most Veterans would go to a staff member at the clinic if they had any questions while completing check-in.

- All of the participants stated that they would go to a staff member with questions, because the staff members are “right there.”
 - Two participants were concerned that staff members wouldn’t be able to answer questions specifically about the online experience, but staff would be able to check them in using the normal in-person process.

MyHealtheVet and VA mobile app users understood why this check-in appointment list existed and was different from their other appointment lists.

- Seven out of nine participants were MyHealtheVet (MHV) users.
- One participant utilized the VA mobile app.
- Multiple participants stated they used the MHV and mobile app appointment lists to prepare for future appointments and this appointment list was for day of activities.
- One participant suggested adding facility name to the appointment cards similar to MHV. It would help if they had appointments at multiple facilities that day.



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Most Veterans understand why they can only check-in for one appointment at a time, but their expected starting point to check-in for their second appointment varied from the appointment list to the poster.

- All Veterans, except one, expected or understood checking in for one appointment at a time.
 - "I like it, that way it does not confuse you by having to check in all at once."
 - One Veteran wanted to be able to check-in for all of their appointments for the day at once.
- What Veterans tried first, in order to check in for a second appointment:
 - Five would start at the poster again.
 - Three would go back to the appointment list web page.



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Additional findings

- One Veteran saw the links available in the mobile header and footer as confusing in this workflow.
 - About the header...“I am a little confused on the search menu and sign in, where will it take you to. I am not really sure what I would be signing into. What menu would come up; I have no idea what it would show me. I don’t think it needs to be there. When you are in this box to check in, you aren’t trying to log into ebenefits.”
 - About the footer...“It says here if you need help ask a staff member ,but you have the contact us here. If someone is new to it, then they may think of hitting contact us and that it would be someone in the office.”

Recommendations

Recommendations

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1. Explore ways to make it easier for Veterans to start the online check-in process, in order to address the current usability issues with the QR code.
 - a. Look into ways to help Veterans understand how to scan QR codes, such as a list of recommended scanners with instructions.
 - b. Possibly change the first step completely, such as not starting with a poster or QR code.
 - i. If we do, look into more accessible options than a poster.
2. Keep the SMS wording and link address as go.usa.gov, since Veterans found it trustworthy.
3. Keep the addition of last name and last four of Social Security as the way to verify identity.
 - a. If the removal of Social Security numbers is mandated, replace it with date of birth.
4. Keep the current “Do you need to update any information?” page, because the functionality to review and update their contact information is coming soon.
 - a. This also helps staff capture information updates, which is an important metric for staff performance.



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Recommendations

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5. Keep the daily itinerary of all appointments, but complete future research into
 - a. how to provide a reference appointment list to Veterans (connection to VAOS),
 - b. and wayfinding (room and floor numbers).
6. Implement all check-in statuses on the appointment list, but remove the term “ineligible” from the wording within the one status.
7. Conduct more research to understand all the telemedicine use cases and how they connect to online check-in.
8. Remove the phone numbers from the “Need help” section, since most Veterans would go to a staff member with questions anyway and clinic phones are transitioning to the call center.
9. Add the facility name to the appointment list to address the scenario of appointments at different facilities within one day.
10. Work with engineering on behaviors when a Veteran attempts to check-in for their second appointment of the day.



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