

# Health Hub Moderated Tree Tests: Conversation Guide

## Intro - X minutes

Thanks for joining us today! My name is [NAME] and I also have some colleagues on the line observing and taking notes. Today we're going to talk about managing healthcare through the VA and observe how you might complete certain tasks online.

Before we start, a few things I want to mention:

- **This entire session should take about [time].** I want to be sure not to keep you much longer, so I may occasionally prompt you with the next question or topic.
- **In this session, we want to hear your honest opinions.** We are not testing your ability. We just want to improve these tools to better meet Veterans' needs. I will not be offended by any opinions you express, and I welcome your feedback.
- **You'll be interacting with a prototype.** This is a demo tool that may not function exactly the way you expect. Some areas of the prototype will be clickable, and some will not. Since it's a demo, none of your actions will affect your actual VA information or benefits.
- **If for any reason and at any time you want to stop the session, please let me know.**
- **Are you comfortable if I record my screen and audio as we talk today?** We use the recordings to confirm that we have captured your opinions accurately. The recordings are destroyed after we complete analysis, and none of your comments will be attributed to you directly.
  - If yes: **Once I start recording, I am going to confirm that you are ok with me recording this session once more.**

*Start recording.*

- **I have started recording.** I'd like to confirm: Are you comfortable if I record my screen and the audio as we talk today?

## Warm-up - X minutes

**Commented [1]:** Change to say you'll be interacting with Optimal Workshop's tool Treejack.

Could you tell me a little bit about yourself? (If stuck ask about location, occupation, military service history)

## Interview - X minutes

**MODERATOR:** To start, I'd like to ask you a few questions about your usage of VA benefits and digital services.

1. Are you currently enrolled in the VA healthcare system and use any of those benefits? A. [IF NO] Where do you get your healthcare from?
2. When you enrolled in VA benefits/your current healthcare plan, did you do so online, in-person, over the phone or through some other means? Any reason why this method?
3. Have you previously used any of the digital tools or services on the va.gov website? A. [IF YES] Could you tell me an example or two of the things you've done on the website, and what your experience has been? B. [IF NO] How do you prefer to interact with the VA, if not on the website?
4. Do you ever manage personal affairs online? For example, are you enrolled in online banking? Manage utilities online? Use healthcare portals? [IF NO] Why not?
5. MODERATOR: So, part of what we'll be focusing on today is how you get and manage healthcare from the VA, and how we might improve that.
6. Are you familiar with MyHealtheVet? A. [IF YES] Tell me about some of the things that you've used it for. Was it easy to navigate?

## Transition to Tree Test - X minutes

**MODERATOR:** Our team has been tasked with thinking through how we might best integrate MyHealtheVet into the VA.gov website and improve the navigation experience for those trying to get and manage their healthcare. In a moment I'll bring up a prototype of what that navigation menu might look like and ask you to complete a few tasks. We'll go over it together to get your feedback. Does that sound good?

**MODERATOR:** As I mentioned, you'll be interacting with a prototype or demo tool. It will not look the site that you may be used to interacting with, but will mimic the information topics that you might click to navigate to pages from the top menu. This tool will mimic the top nav it's still a work in progress, there might be a few mistake or it may not function exactly the way you expect. That's okay! Some areas of the prototype will be clickable, and some will not. Since it's a demo, none of your actions will affect your actual VA information or benefits.

**Commented [2]:** Change to be about Optimal Workshop's tool Treejack.

**MODERATOR:** As part of this prototype, ~~there will be a I'll give you~~ a task and ask that you try something called "thinking aloud" while you do it. It's kind of like narrating what you see in front of you and what you might do. An example I like to give, is if someone gave me a task of calling my mom and asked me to think aloud while I do it.

Commented [3]: Change to "study"?

So: "I'm pulling out my cell phone from my pocket. I see the time on the screen and I swipe up to unlock it. I'm looking for the cell phone icon and then select that. Now I see my contact list and I scroll to my mom's name. I select that, I now see the call button and click that to make a call."

I'm going to send you a link in the zoom chat. Please open it up in a web browser, and then let me know once you see it.

[Pause for confirmation]

Okay, now I'm going to ask you to share your screen on Zoom so that we can look at the prototype together.

[Zoom Share Screen Directions](#)

## Tree Test Tasks - X Minutes

**MODERATOR:** Please read the directions, think aloud and walk me through your thought process as you complete each task. Between tasks, or as you speak, I may stop to ask questions. Please begin.

### Tasks for Veterans

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1. You want to know if you can get VA health care
2. You want to enroll in VA health care
3. You want to know if you can get dental benefits through VA
4. You want to know what types of services and support you can get for your mental health needs
5. You want to find out the costs for VA health care services
- ~~6. You just received your new disability rating. You want to find out how this could affect how much you would have to pay for VA health care~~
- ~~7.6.~~ You want to see your VA health records to a non-VA provider
- ~~8.7.~~ You want to check how much you owe for your last medical visit and pay your bill
- ~~9.8.~~ You need to request a refill for a prescription you get from VA by mail
- ~~10.9.~~ You have a question for your doctor and want to communicate with them online

11.10. You want to know if VA will pay for you to get health care outside of the VA

11. You drove to your VA primary care appointment and want to get paid back for the cost of gas

#### Tasks for Caregivers:

1. As a family member or caregiver of a Veteran, you want to know if the Veteran qualifies for VA health care.
2. As a family member or caregiver, you want to know if you can get dental benefits through VA.
3. You want to know what types of services and support you can get for your mental health needs.
4. As a family member or caregiver of a Veteran, you want to find out the Veteran's cost for health care services.
5. You're the spouse or caregiver of a Veteran and you want to know if you can get health care through VA.
6. As a family member or caregiver of a Veteran, you want to send their VA health records to a non-VA provider.
7. As a family member or caregiver of a Veteran, you want to check how much the Veteran owes for their last medical visit and pay the bill.
8. The Veteran in your family needs to request a refill for a prescription they get from VA by mail.
9. As a Veteran's family member or caregiver, you have a question for the Veteran's doctor and want to communicate with them online.
10. You drove the Veteran in your family to a VA primary care appointment at VA and want to get paid back for the cost of gas.
11. As a family member or caregiver of a Veteran, you want to know if VA will pay for the Veteran to get health care outside of VA.

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## Thank-You and Closing - X minutes

Well we really appreciate you taking the time to share your thoughts with us today. Your feedback is so helpful to us as we continue to work on the site and make sure it really works for Veterans.

Do you have any questions or other comments for me before we sign off?

Great, well thank you so much again, and enjoy the rest of your day!

**NOTES:**

**What is goal of next Tree study?** Qualitative Feedback to address nuisances and anomalies of first tree tests.

- H1 performed better on “get” tasks. What are the nuances of “manage” tasks that might make them a bit more challenging?