

VA



U.S. Department
of Veterans Affairs

VA Mobile App: Information Architecture Research

(Mostly) Closed Card Sort Findings
Internal Team Presentation

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Today's agenda

- Review results of closed card sort
- Questions & discussion
- Next steps

Acknowledgements

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Liz Lantz

Kristen McConnell

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Liz Straghalis

Alex Taylor

Background & Goals

Background & goals

The VA Mobile app was designed to allow Veterans to more easily complete key transactions across VA Health and Benefits services.

As the app grows in its feature set, we need to understand how Veterans would navigate benefits and health services within the mobile app. We want to ensure the structure and organization of the app makes sense and can accommodate the new features we have identified as being of interest on our roadmap.

The **purpose** of this work is to inform the information architecture, content and design of the VA Mobile app in order to deliver a solution that is usable, useful, and extensible.*

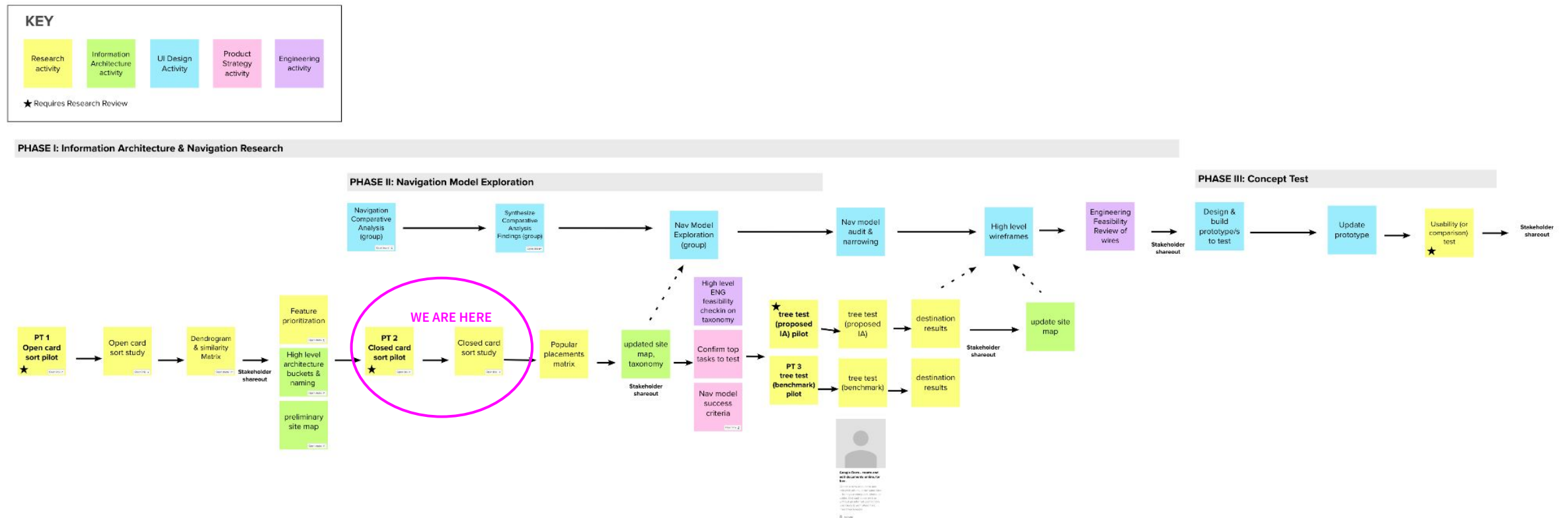
Our **goal** in this study is to:

- Understand how users think about the current and possible future content in the VA mobile app
- Confirm what the high-level information architecture categories should be in the VA mobile app

Lean user research & IA process

This card sort is the second piece of a three part research study:

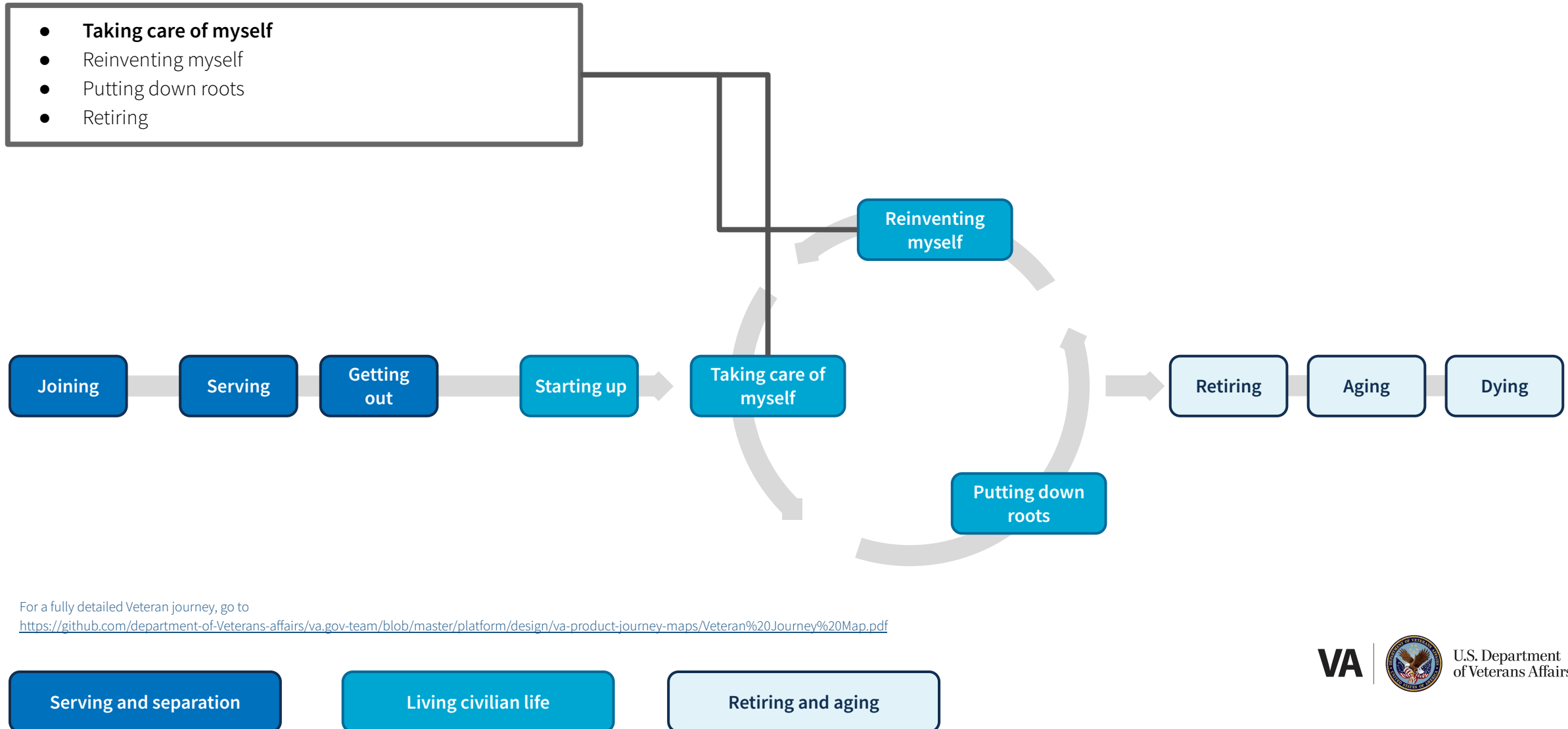
Last updated 3/18/2022



Resources:

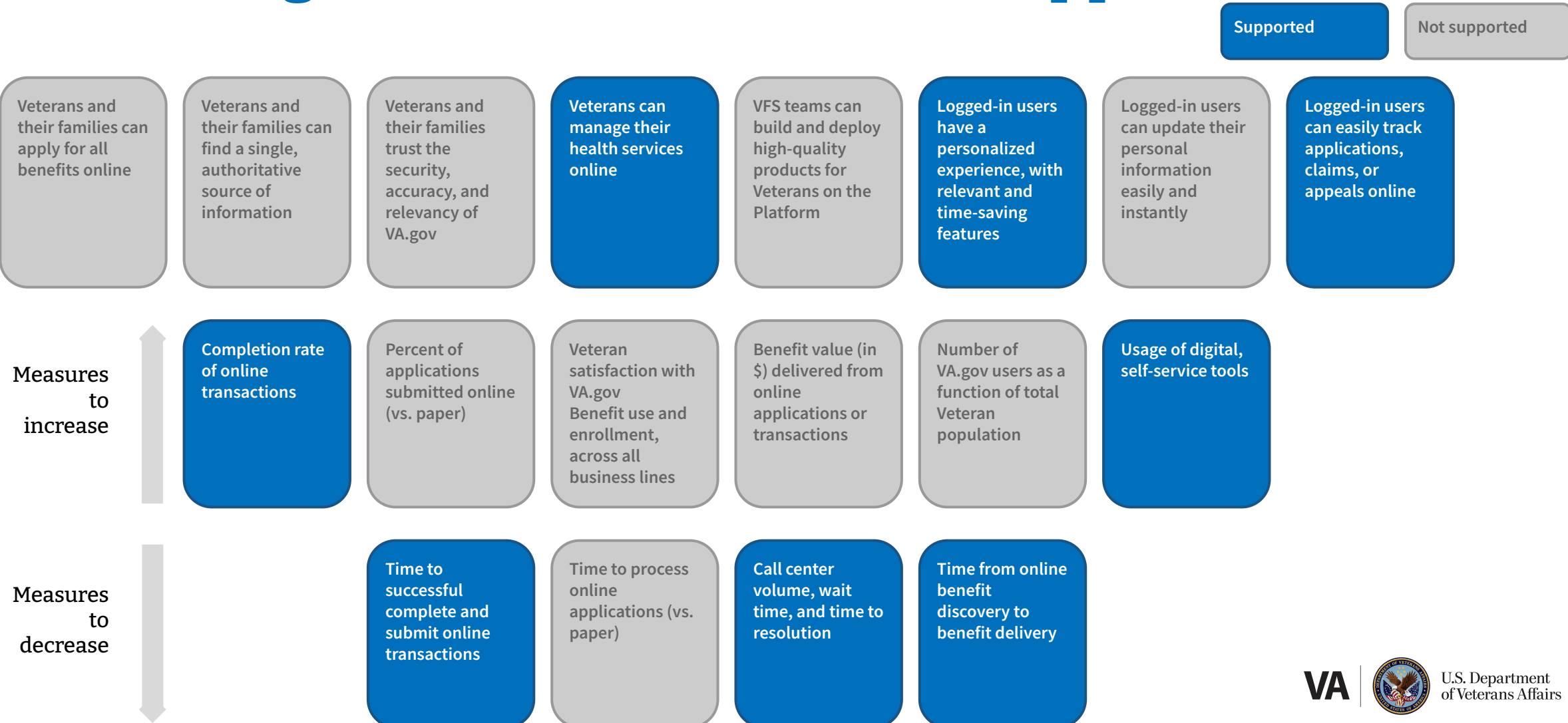
[VA Mobile App: Information Architecture & Navigation - High Level Project Summary](#)

How this research maps to the Veteran journey



For a fully detailed Veteran journey, go to
<https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/platform/design/va-product-journey-maps/Veteran%20Journey%20Map.pdf>

OCTO-DE goals that this research supports



Research Questions & Method

Research questions

- 1. How do Veterans think about the current and proposed pieces of content on the VA Mobile app?**
 - a. Do participants understand the proposed categories?
 - b. Are there any cards that participants felt uncertain about what category to place them in?
 - c. Are there any categories missing?

- 2. Does previous experience with the VA mobile app affect Veteran mental models as they relate to the VA Mobile app?**
 - a. If yes, in what way?

Method & recruiting

Unmoderated Closed Card Sort

46 participants took part in a closed card sort using Optimal Sort, an asynchronous, web-based card sorting platform.

They represent:

- Diversity across age groups
- Diversity across racial identities
- Diversity across education levels
- Diversity across rural and metropolitan areas
- More than 10 women

All used a desktop computer.

The screenshot shows the Optimal Sort interface. On the left is a vertical list of cards to be sorted, including: 'Pay your health care copay', 'Make a doctor appointment', 'Turn on/off the ability to sign in with your finger print or face ID', 'Join a virtual doctor appointment', 'Schedule a vaccination appointment', 'Request a prescription refill', 'Manage the dependents benefitting from your disability compensation', 'Review balance of education funds remaining to you', 'Contact the VA', and 'Review your personal information and set the address, phone numbers and email address associated with'. At the bottom of this list, it says '36 of 36 remaining'. On the right, there are five categories for sorting: 'General VA Info', 'Health', 'Account', 'Payments', and 'Benefits'. Each category has a box labeled '0 items'. At the top right, there are buttons for 'View instructions', 'Leave a comment', and a green 'Finished' button.

Participant demographics

Findings may not include the perspectives of the following underserved Veteran groups:

- Veterans who have a **cognitive disability**
- Veterans who **don't have a degree**
- Veterans who identify as **Latinx, Asian, Native, or LGBTQ+**
- Veterans who **live abroad**
- **Other than honorable**
- **Assistive technology users**
- Veterans who **use mobile exclusively**

We recommend studies with these underserved groups in the future.

VA Mobile App - Closed Card Sort - 2/2022																
final # of participant	45		# of AT users					0		# of no shows					14	
		roster	P1	P2	P4	P5	P6	P7	P10	P12	P16	P17	P19	P20	P23	P24
Category	Target	Study	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Veterans	Based on current VA statistics															
Age 55-64+	23	25	1	1	0	0	1	1	0	0	0	1	1	0	1	0
Cognitive Disability	unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Mobile user	unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Rural	12	25	0	0	1	0	0	1	1	1	1	1	0	1	0	1
No degree	12	7	0	0	0	0	1	0	0	0	0	0	0	1	1	0
Other than honorable	unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Immigrant origin	unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Women	5	21	1	0	1	0	0	1	0	0	1	1	1	0	0	1
Expat (living abroad)	unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Race	Based on VA's projected statistics															
Black	7	6	1	0	0	0	0	1	0	0	1	0	0	0	0	1
Hispanic	6	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Biracial	2	3	0	0	0	0	0	0	0	0	0	0	0	1	0	0
Asian	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Native	1	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	unknown	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Transgender	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Nonbinary, gender fluid, ge	1	2	0	0	0	0	0	0	0	0	0	0	0	0	1	0

Cards tested in sort (36)

Existing app features:

1. biometric sign on setting
2. claim status
3. contact the VA
4. COVID-19 updates & information
5. disability rating
6. find a VA location
7. list of medical appointments
8. manage direct deposit
9. military information
10. notification settings
11. personal and contact information
12. privacy policy
13. secure messaging
14. VA letter and documents
15. view direct deposit payment history
16. sign out
17. share the app

Proposed/Future features:

1. disability compensation
2. education payments
3. GI bill balance
4. health record
5. join a video appointment
6. labs and tests
7. list of prescriptions
8. make a doctor appointment
9. manage dependents
10. transfer GI bill dependents
11. patient check-in
12. pay back your overpayments
13. pay your health care copay
14. pension payments
15. prescription refill request
16. schedule an immunization appointment
17. travel expense reimbursement
18. vaccine records
19. Veteran ID card

Card sort categories

Platform constraints, future business goals & card sort testing requirements informed our provided categories.

Current VA.gov Category Names	Current App Category Names	Closed Card Sort App Category Names
Health Care	Health	Health
<ul style="list-style-type: none">Disability > Claims and appealsEducation and trainingRecords	Claims (disability claims only)	Benefits
N/A (payment-related info is spread out across all categories)	N/A (payment info is located in Profile)	Payments
<ul style="list-style-type: none">MyVA > Profile	Profile (also includes Records, Payments, App Settings information)	Account
<ul style="list-style-type: none">Find a VA LocationContact UsVA COVID-19 UpdatesPrivacy Policy	Home	General VA Info*

We used description text instead of section labels listed here in the card sort for clarity purposes. We also allowed participants to create their own groups.

Findings

tl;dr: Overall, participants grouped cards in similar ways, and the categories they created contained the same core **groups of cards**. In a small subset of cards, there was greater variation around category placement.

Hypothesis: Intended category groupings tested

Category recommendations for top-level navigation (based on open card sort findings, related desk research & grouping/naming activity):

Health (no change)	Benefits (Claims)	Payments (New!)	Account (Profile)	General VA Info (Home)
<ul style="list-style-type: none">→ COVID-19 updates & information→ vaccine records→ make a doctor appointment→ list of medical appointments→ secure messaging→ prescription refill request→ schedule an immunization appointment→ patient check-in→ health record→ join a video appointment→ labs and tests→ list of prescriptions	<ul style="list-style-type: none">→ claim status→ VA letters and documents→ GI bill balance→ transfer GI bill dependents	<ul style="list-style-type: none">→ disability compensation→ education payments→ view direct deposit payment history→ manage direct deposit→ pay your health care copay→ pay back your overpayments→ pension payments→ travel expense reimbursement	<ul style="list-style-type: none">→ disability rating→ Veteran ID card→ military information→ personal and contact information→ manage dependents→ biometric sign on setting→ notification settings→ sign out→ share this app	<ul style="list-style-type: none">→ contact the VA→ find a VA location→ privacy policy

We used description text instead of section labels listed here in the card sort for clarity purposes.

Key findings: Participant category results

With a few exceptions, participants agreed where cards should be sorted. They also sorted the cards into the categories we predicted:

Health (no change)	Benefits (Claims)	Payments (New!)	Account (Profile)	General VA Info (Home)
<ul style="list-style-type: none"> → COVID-19 updates & information → vaccine records → make a doctor appointment → list of medical appointments → secure messaging → prescription refill request → schedule an immunization appointment → patient check-in → health record → join a video appointment → labs and tests → list of prescriptions 	<ul style="list-style-type: none"> → claim status → VA letters and documents → GI bill balance → transfer GI bill dependents → disability rating → manage dependents 	<ul style="list-style-type: none"> → disability compensation → education payments → view direct deposit payment history → manage direct deposit → pay your health care copay → pay back your overpayments → pension payments → travel expense reimbursement 	<ul style="list-style-type: none"> → disability rating → Veteran ID card → military information → personal and contact information → manage dependents → biometric sign on setting → notification settings → sign out → share this app → VA letters and documents 	<ul style="list-style-type: none"> → contact the VA → find a VA location → privacy policy → share this app → COVID-19 updates & information → sign out

Cards that were sorted into a different category than we expected are indicated above in **bold, orange text**. Cards that were sorted at least 30% into a second category appear in *italics*. See [Standardization grid](#) for detailed table of categories

Key findings: Card agreement rate by category

Participants agreed on which categories to place the majority of cards, with 20 out of 36 cards having very high agreement (33 had “high” agreement or greater).

Health (no change)	Benefits (Claims)	Payments (New!)	Account (Profile)	General VA Info (Home)
<ul style="list-style-type: none"> → vaccine records → make a doctor appointment → list of medical appointments → secure messaging → prescription refill request → schedule an immunization appointment → patient check-in → health record → join a video appointment → labs and tests → list of prescriptions 	<ul style="list-style-type: none"> → claim status → GI bill balance → transfer GI bill dependents → disability rating → manage dependents 	<ul style="list-style-type: none"> → pay back your overpayments → pay your health care copay → view direct deposit payment history → manage direct deposit → disability compensation → pension payments → travel expense reimbursement → education payments 	<ul style="list-style-type: none"> → Veteran ID card → personal and contact information → biometric sign on setting → military information → notification settings → sign out → share this app → VA letters and documents 	<ul style="list-style-type: none"> → contact the VA → find a VA location → privacy policy → share this app → sign out → COVID-19 updates & information

Agreement = % of the time that a card was sorted into a category

Very High Agreement (>78%/35.88) **20 cards**

High Agreement that a card belongs in a category (>60%/27.6) **13 cards**

Lower Agreement that a card belongs in a category (<60%) **3 cards**

Key findings: Categorization of cards

Only a few participants created new categories

- 7 out of 46 participants created new categories
- The most common new category created was Education (3).
- Other categories created: This App (1), VA Letters & Documents (1), Other (1), Computer/Cloud Documents (1)

The new Payments category performed well

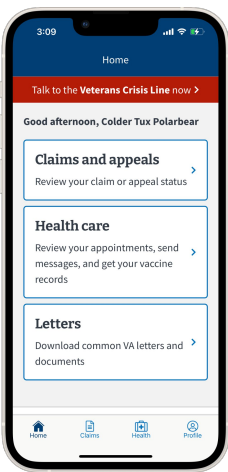
- Despite the fact that a consolidated category does not yet exist on VA.gov, the majority of participants sorted payment-related cards into the new Payments category.

See [Standardization grid](#) for detailed table of cards & categories

Key findings: Categorization of cards (cont.)

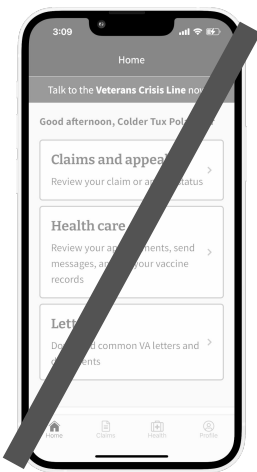
Previous use of the VA Mobile app seemed to affect the way participants sorted cards.

19 participants who reported that they were **VA Mobile App users** grouped the cards in similar ways.



Health	Very High	
Benefits	High	Very High
Payments	High	Very High
Account	High	Very High
General info	High	Very High

27 participants who reported that they were **not VA Mobile app users**, grouped the cards in a variety of different ways.



Health	Very High		
Benefits	low		High
Payments	low		High
Account	low	High	Very High
General info	low	High	Very High

Key (Agreement %):	50% or less	60% +	78% +
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See [Standardization grid](#) for detailed table of cards & categories

Key findings: Comprehension

- **Nearly all** participants (42 of 46) reported that they **understood the proposed categories**
- **More than half** of participants (25) reported that they **felt uncertain about where to place one or more cards** (21 participants said they did not):
 - **7 participants mentioned uncertainty around Benefits**
 - “Benefits, because almost everything fit somewhere else...” **P7**
 - “I felt uncertain about finding balance for benefits.” **P6**
 - **7 participants mentioned Payments**
 - “Payments to and from; documents, etc. establishing veteran status...” **P14**
 - **6 participants mentioned a need for subcategories**
 - “...excessive number of cards in health and benefits without the ability to subcategorize...” **P14**
 - “I would want separate benefits tabs... one for education benefits and one for disability benefits” **P23**
 - **2 participants mentioned Account**
 - “Anything with "MY" or my family status should be accessible in My personal account” **P#1**

Recommendations

Recommendations

Overall, participants grouped cards in similar ways—the categories they created contained the same core groups of cards. In a small subset of cards, there was greater variation around category placement.

Because these core groups were strong, we recommend moving forward rather than following up with another card sort.

[What is a Tree Test and what can we learn from it?](#)

Recommendations (cont.)

We recommend the following changes to the taxonomy to improve clarity between categories and better match participants' mental models:

Health

- Keep category name & contents as proposed.
- Explore adding subcategories in tree test taxonomy.

Payments

- Keep category name (could also consider an alternate label, 'Money?' if Payments doesn't feel inclusive enough of both payments and debts); keep other content as proposed.
- Move 'Manage direct deposit' into this category.

Benefits

- Keep the category name, explore adding subcategories (Education and training, Disability claims and appeals) in taxonomy to address extensibility (allowing the app to grow in terms of benefit-related feature set).
- Move 'disability rating' and 'manage dependents' into this category.

~~Account~~ **Profile**

- Because it was a 'catchall' category for some participants, we recommend returning to "Profile" to better distinguish from Benefits category ("Account" label may be too general), explore adding subcategories in tree test taxonomy.
- Move 'VA letters & documents' into this category

~~General VA Info~~ **N/A**

- Because it was a 'catchall' category for some participants, we recommend that we consider renaming this category or dropping it altogether and having items live on Home (as they do currently).
- Consider moving 'Share this app' into this category.

Recommendations (cont.)

Category recommendations for top-level navigation in Tree Test (updated based on closed card sort findings and business goals):

Health (no change)	Benefits (Claims)	Payments (New!)	Profile	N/A (Home)
<ul style="list-style-type: none">→ COVID-19 updates & information→ vaccine records→ make a doctor appointment→ list of medical appointments→ secure messaging→ prescription refill request→ schedule an immunization appointment→ patient check-in→ health record→ join a video appointment→ labs and tests→ list of prescriptions	<ul style="list-style-type: none">→ claim status→ VA letters and documents→ GI bill balance→ transfer GI bill dependents→ disability rating→ manage dependents	<ul style="list-style-type: none">→ disability compensation→ education payments→ view direct deposit payment history→ manage direct deposit→ pay your health care copay→ Pay back your overpayments→ pension payments→ travel expense reimbursement	<ul style="list-style-type: none">→ Veteran ID card→ military information→ personal and contact information→ VA letters and documents→ sign out→ biometric sign on setting→ notification settings→ privacy policy→ share this app	<ul style="list-style-type: none">→ contact the VA→ find a VA location→ COVID-19 updates & information

Changes based on closed card sort findings are indicated in **orange**.

[What is a Tree Test and what can we learn from it?](#)

Recommendations (cont.)

- As of 3/16/22, 'COVID-19 updates' isn't on the VA.gov home page (but is still accessible via search, and vaccine information is included in the Health section)—we recommend following their lead in terms of whether or not to include it on the homescreen.
- Based on the difference in mental models participants had around some cards, we recommend considering onboarding or cross-references to address the gap.
- Consider testing the findability of items in the current VA Mobile app's IA using TreeJack to set a benchmark before testing the findability of items in the proposed IA.

Questions & Discussion

Next steps

Next steps

- **Phase I: IA Research Track**

- **Taxonomy & sitemap update**

- Update proposed taxonomy & app sitemap based on closed card sort findings
- Review taxonomy with ENG for feasibility
- Review proposed taxonomy & app sitemap with stakeholders (meeting TBD)

- **Tree Testing (Current vs New IA)**

- Stakeholders approve **key tasks** to test
- **Prep for Benchmark** study of examining findability of key tasks in VA Mobile app's **current IA**
- Prep for study examining findability of key tasks in VA Mobile app's **proposed IA**

- **Phase II: Navigation Exploration Track**

- Share results of [navigation UI pattern comparative analysis](#)
- Stakeholders confirm navigation model **success criteria** (meeting TBD)
- Designers explore navigation models (wireframes)
- Conduct navigation model audit & narrowing based on criteria

Tree Testing: Top Tasks for Approval

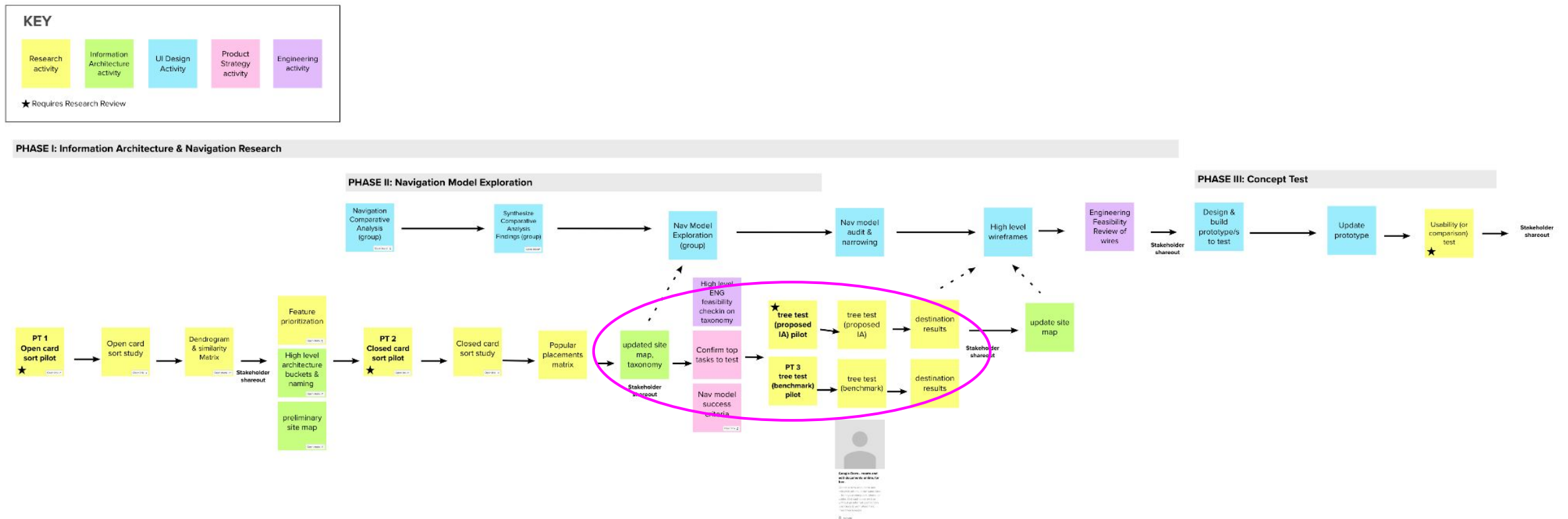
Tasks should cover all IA categories, represent both easy tasks and cards/tasks that were most confusing to users. Test should be limited to 8-10 tasks.

in app?	Section	Task
existing	Current IA: Claims New IA: Benefits	Check the status of your disability claim
new	<u>Payments</u> & Health	Find out how much you owe for a medical copay
existing	Current IA: Profile, Home New IA: <u>Profile</u> & Benefits	Locate an official letter indicating Veteran status
new	<u>Payments</u> & Benefits	Review balance of education funds remaining to you
existing	Current & New IA: Profile	Update home address
new	Benefits	View benefit summary
existing	Current & New IA: Health	Send a secure message
existing	Current & New IA: Health	View appointments

Lean User Research & IA Process

Next steps: Prep for card sorts & navigation model audit

Last updated 3/18/2022



Resources:

[VA Mobile App: Information Architecture & Navigation - High Level Project Summary](#)

Thanks!

Questions?

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Appendix

Research questions, answered

- **How do Veterans think about the current and proposed pieces of content on the VA Mobile app?**
 - **Participants agreed on which categories to place the majority of cards**, with 33 out of 36 cards having at least “high” agreement in a single category among participants (20 had “very high” agreement)
 - A few cards had **lower agreement** among participants (fewer than 60% sorted them into the same category):
 - **Education reimbursements** from the VA (58% in Payments, 26% in Benefits, 8% in Account, 6% in Education)
 - **COVID-19 updates & information** (54% in General VA Info, 39% in Health, 2% in Account, 2% in Benefits, 1% N/S)
 - **VA letters and documents** (nearly even split of 43% in Benefits & 48% in Account, 4% in General VA info, 4% in VA letters & documents)
 - **However, categories created by participants varied & there was some overlap between categories.**
 - **Health** was the strongest category, with most participants agreeing on the exact contents.
 - The new **Payments** category had fair agreement among participants
 - Cards within **Payments, Account, Benefits, and General VA Info** had high or very agreement.
 - Participants sorted 33 different cards into Account, 22 different cards into General VA Info and 20 different cards into Benefits).
 - There was also **overlap** in the cards sorted into the **Benefits, Account & Payments** categories.
 - Some participants also expressed uncertainty about these categories in our questionnaire.

Research questions, answered (cont.)

- **Do Veterans understand the proposed categories?**
 - **Yes.** Nearly all participants (42 of 46) reported that they understood the proposed categories
- **Are there any cards that Veterans felt uncertain about what category to place them in?**
 - **Yes.** More than half of participants (25) reported that they felt uncertain about where to place one or more cards (21 participants said they did not).
 - 7 participants mentioned **Benefits**
 - “Benefits, because almost everything fit somewhere else...” **P7**
 - “I felt uncertain about finding balance for benefits.” **P6**
 - 7 participants mentioned **Payments**
 - “Payments to and from; documents, etc. establishing veteran status...” **P14**
 - 6 participants mentioned a **need for subcategories**
 - “...excessive number of cards in health and benefits without the ability to subcategorize...” **P14**
 - “I would want separate benefits tabs... one for education benefits and one for disability benefits” **P23**
 - 2 participants mentioned **Account**
 - Anything with "MY" or my family status should be accessible in My personal account

Research questions, answered (cont.)

- **Are there any categories missing?**
 - **Mostly no.**
 - 5 out of 46 participants created new categories
 - The most common new category created was Education (3)
 - Other categories created: This App (1), VA Letters & Documents (1), Other (1), Computer/Cloud Documents (1)
- **Does previous experience with the VA mobile app affect veteran mental models as they relate to the VA Mobile app?**
 - **Yes.** 19 out of 46 participants reported they had used the VA Mobile app, 27 reported they had not. Previous use of the VA Mobile app seemed to affect the way participants sorted cards. VA Mobile app users sorted their cards in a similar way

Mostly Closed Card Sort - Standardization Grid

Standardization grid ⓘ

Total participants 0  46

Name	Account	Benefits	Education	General ...	Health	Payments	VA Letter...	Not standardized
Access letters and documents	22	20		2			2	
COVID-19 updates & informat	1	1		25	18			1
Check the status of a disability	8	35		2	1			
Check your disability rating	9	33		2		1	1	
Check-in for your doctor appo		1			45			
Contact the VA	1			45				
Find a VA location	2			44				
Join a virtual doctor appointm		1			45			
Make a doctor appointment	1			2	43			
Manage the dependents bene	15	29				2		
Manage the types of notificati	34			12				
Manage your direct deposit in	15			1		30		
Message your healthcare pro	4				42			
Pay your health care copay	4			1	5	36		
Repay money you owe the VA	5			2		39		
Request a prescription refill	2				44			
Review a list of your prescribe	1				44	1		
Review balance of education	7	31	3			5		
Review pension payments the	9	4				33		
Review privacy policy	7			38				1
Review reimbursements the V	4	12	3			27		
Review the history of disability	6	10				30		
Review your digital Veteran ID	36	5		4			1	
Review your direct deposit pa	4	3				39		
Review your health record	1	1		1	43			
Review your history of vaccin	1			1	44			
Review your labs and test res					46			
Review your past & upcoming	1			1	44			
Review your personal informa	43	1		2				
Schedule a vaccination appoi	1			2	43			
Share the app	14	1		30				1
Sign Out of the app	28			17				1
Submit a travel expense reimb	7	7			1	30		1
Transfer GI bill dependents	10	32	3			1		
Turn on/off the ability to sign i	40	1		5				
Your branch and period of mil	34	5		5	1		1	

Dark Blue = Very High Agreement
(78% or above/35.88)

20 cards

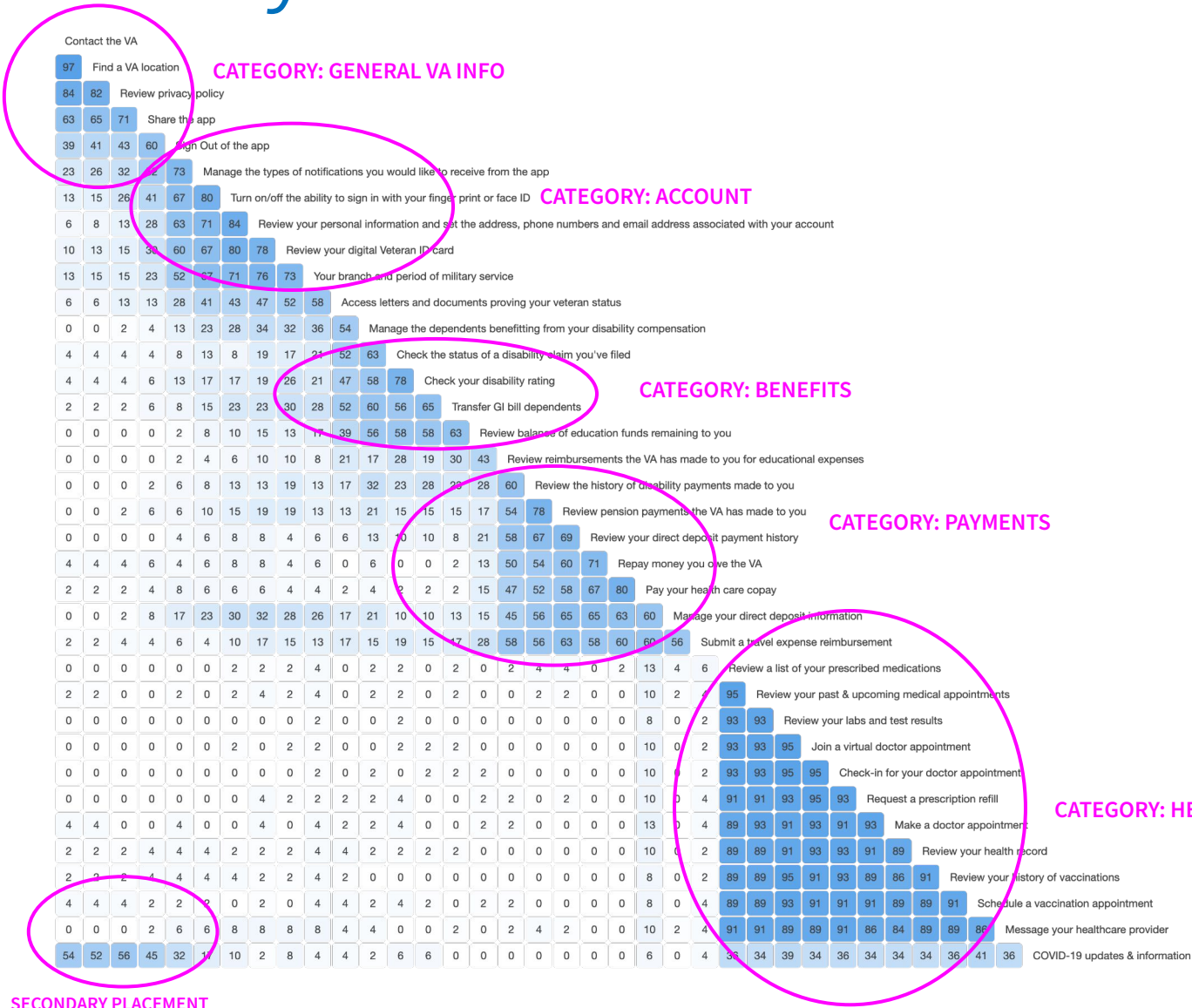
Medium Blue = High Agreement
60-77% or 27.6-35.88)

13 cards

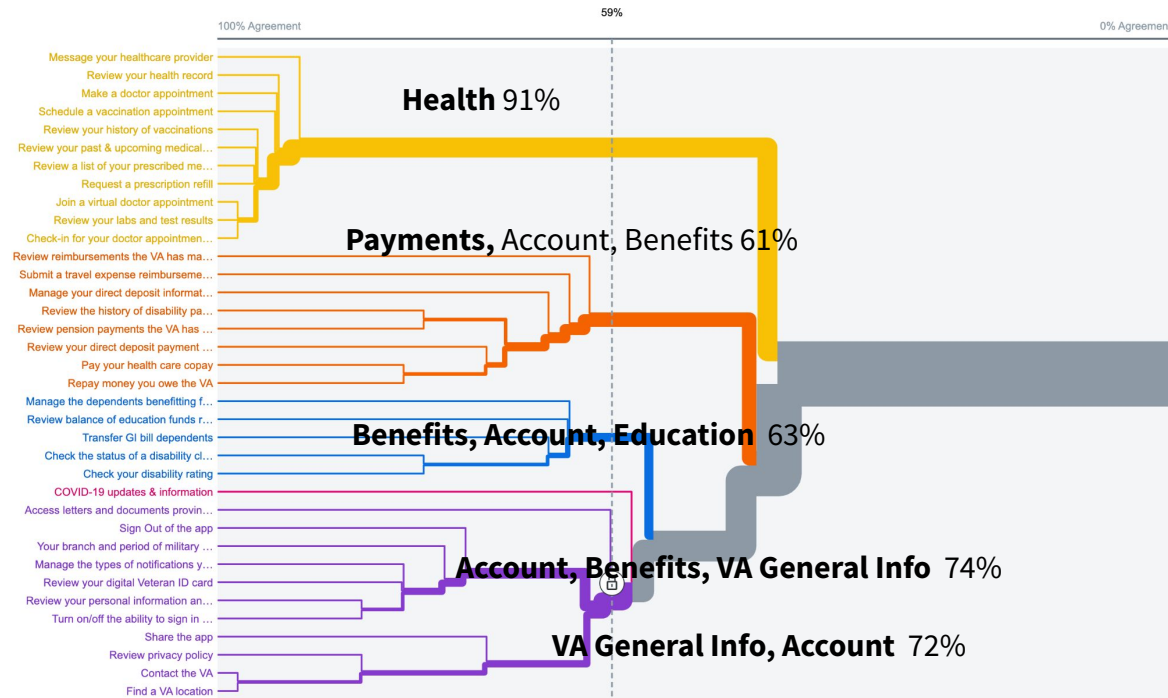
Light Blue = Lower Agreement
(less than 60%/27.6)

3 cards

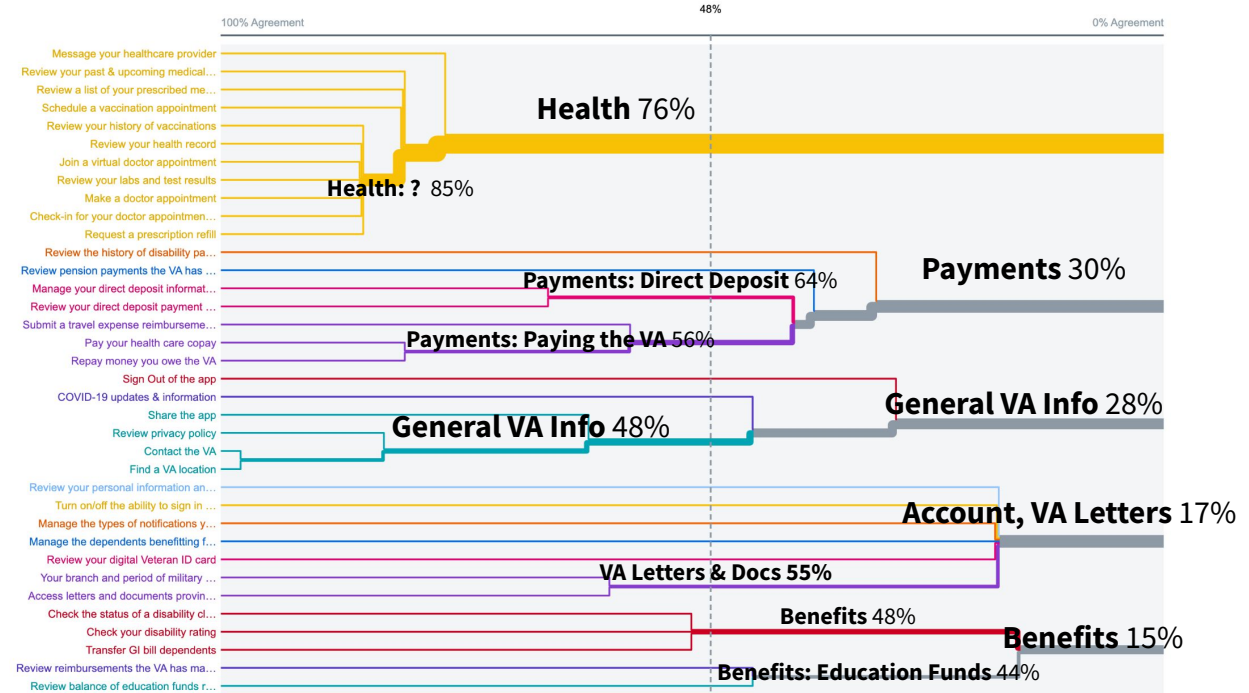
Mostly Closed Card Sort - Similarity Matrix



Mostly Closed Card Sort - Dendrograms



Best Merge Method



Actual Agreement Method

Payments	wanted sub categories	Benefits	Health	confused about mobile app mention	account	depends
Payments to and from	Benefit related questions. I want separate categories for different benefit types.	Benefits and payments I hesitated a little. Maybe need smaller sub-categories.	medication refill or lab results.	Apps question	Account	<p>Something I did hesitate to do, definitely, was the "Travel" and "Medical" categories. I think the idea should be to categorize by "type of benefit" rather than by "type of payment". I think the "Travel" and "Medical" categories should be separate from the "Health" category. I think the "Travel" and "Medical" categories should be separate from the "Health" category. I think the "Travel" and "Medical" categories should be separate from the "Health" category.</p>
The payments and benefits almost seemed to overlap	medical-needs sub category.	Benefits, because almost everything else so I wanted to be sure of the right place for things.	excessive number of cards in health and benefits without the ability to sub-categorize	The one new discussing an app.	anything with "MY" or my family status should be accessible in My personal account	managing depends
co-payment record of payments received	excessive number of cards in health and benefits without the ability to sub-categorize	Benefits related questions. I want separate categories for different benefit types.	medical-needs sub category.	Signing in and out of the app		
Payments	Most of them. It seemed there needed to be sub-categories for each.	Some I felt could be under benefits or my account				
Payments	Benefits and payments I hesitated a little. Maybe need smaller sub-categories.	benefits and account could overlap.				
Travel reimbursement	<p>All of them for the "Travel" and "Medical" categories. I think the idea should be to categorize by "type of benefit" rather than by "type of payment". I think the "Travel" and "Medical" categories should be separate from the "Health" category. I think the "Travel" and "Medical" categories should be separate from the "Health" category. I think the "Travel" and "Medical" categories should be separate from the "Health" category.</p>	finding balance for benefits.				
Payments received	Six participants suggested having sub-categories would help	The payments and benefits almost seemed to overlap				
Seven people mentioned uncertainty about the payment section		Benefits account and payments had confusion. Participants expressed uncertainty about these categories				

Key findings: Mobile app user vs (non mobile app user) categories

Veterans did not categorize cards in a similar manner to how they are organized on VA.gov.

Health (no change)	Benefits (New!)	Payments (New!)	Account (Profile)	General VA Info* (Home)
<ul style="list-style-type: none">→ COVID-19 updates & information→ vaccine records→ make a doctor appointment→ list of medical appointments→ secure messaging→ prescription refill request→ schedule an immunization appointment→ patient check-in→ health record→ join a video appointment→ labs and tests→ list of prescriptions	<ul style="list-style-type: none">→ claim status→ VA letters and documents→ GI bill balance→ transfer GI bill dependents	<ul style="list-style-type: none">→ disability compensation→ education payments→ view direct deposit payment history→ manage direct deposit→ pay your health care copay→ Pay back your overpayments→ pension payments→ travel expense reimbursement	<ul style="list-style-type: none">→ disability rating→ Veteran ID card→ military information→ personal and contact information→ manage dependents→ biometric sign on setting→ notification settings→ sign out→ share this app	<ul style="list-style-type: none">→ contact the VA→ find a VA location→ privacy policy

VA.gov category:

Health care

Education

Disability

Tree Test

What is a Tree Test?

The tree test will test our hierarchical category structure by having users find the locations where specific tasks can be completed.

Tree testing is incredibly useful as a follow-up to card sorting because it:

- Evaluates a hierarchy according to **how it performs in a real-world scenario**, using tasks similar to a usability test; and
- Can be **conducted well in advance** of designing page layouts or navigation menus, **allowing inexpensive exploration and refinement** of the menu categories and labels.
- Can be used later to give us a **clear, quantifiable benchmark** for us to improve on in future taxonomy iterations (If we test our first tree with 8 tasks, and then test revised our tree with the same 8 tasks, we'll be able to pinpoint exactly how our changes have improved the **findability of our information**).

What questions does a Tree Test answer?

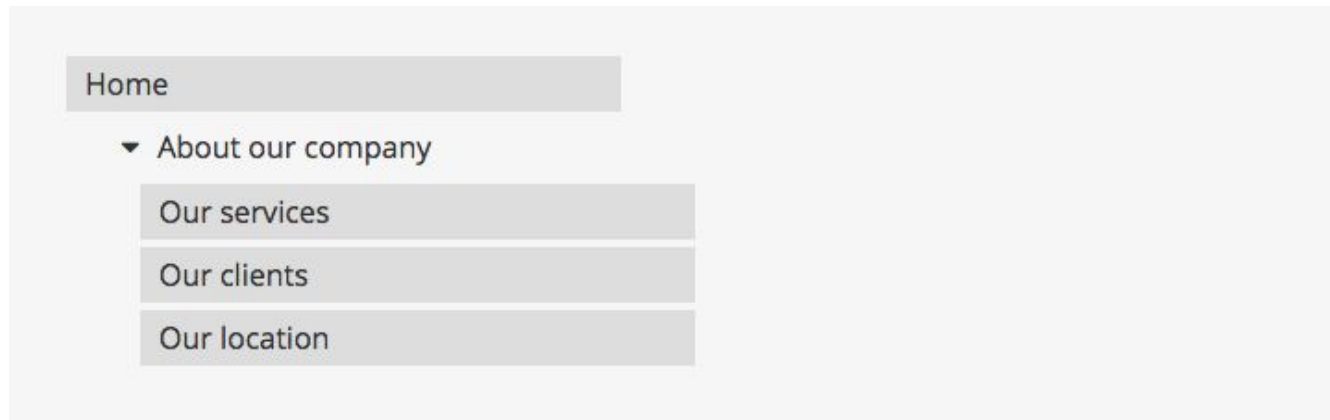
Tree testing helps us understand:

- How many people **completed the task** successfully?
- Of those who were unsuccessful, **what information did they select instead?**
- Did people go **straight to an answer**, or did they have to move back up the tree?
- Exactly **which path did people take** before they selected an answer?

Example task in Treejack

“How would you find out the Acme company’s mailing address?”

Participants would see this on the tree like this:



And they would click through the tree until they could select ‘Our location’ to complete the task successfully:



Tree Test #1 (Proposed IA): Scope

- **What will we test:** The proposed taxonomy for the VA Mobile app, informed by two rounds of card sorts.* Test should cover all categories & represent both easy tasks and cards/tasks that were most confusing to users, limited to 8-10 tasks.
- **Why are we testing:** We are testing the findability of tasks within our proposed IA—we want to see if our new categories and labels are intuitive for users.

**We can also iterate with future tests. If we have some strong competing ideas, we can test multiple versions. We can also conduct additional tree tests in the future, as we expand the functionality of the VA Mobile app.*

Tree Test #2 (Current app IA): Scope

- **What will we test:** The existing taxonomy for the VA Mobile app. We will reuse the tasks we are planning for the proposed app IA tree test (limited to those that are relevant in the current app).
- **Why are we testing:** We are testing the findability of tasks within our current IA in order to set a benchmark.

Top Tasks to Test (Tree or Usability Test)

Tasks should cover all IA categories, represent both easy tasks and cards/tasks that were most confusing to users. Test should be limited to 8-10 tasks.

Section	Task
Current IA: Claims New IA: Benefits	Check the status of your disability claim
<u>Payments</u> & Health	Find out how much you owe for a medical copay
Current IA: Profile, Home New IA: <u>Profile</u> & Benefits	Locate an official letter indicating Veteran status
<u>Payments</u> & Benefits	Review balance of education funds remaining to you
Current & New IA: Profile	Update home address
Benefits	View benefit summary
Current & New IA: Health	Send a secure message
Current & New IA: Health	View appointments