

“My health” IA research (tree test)

January 2023

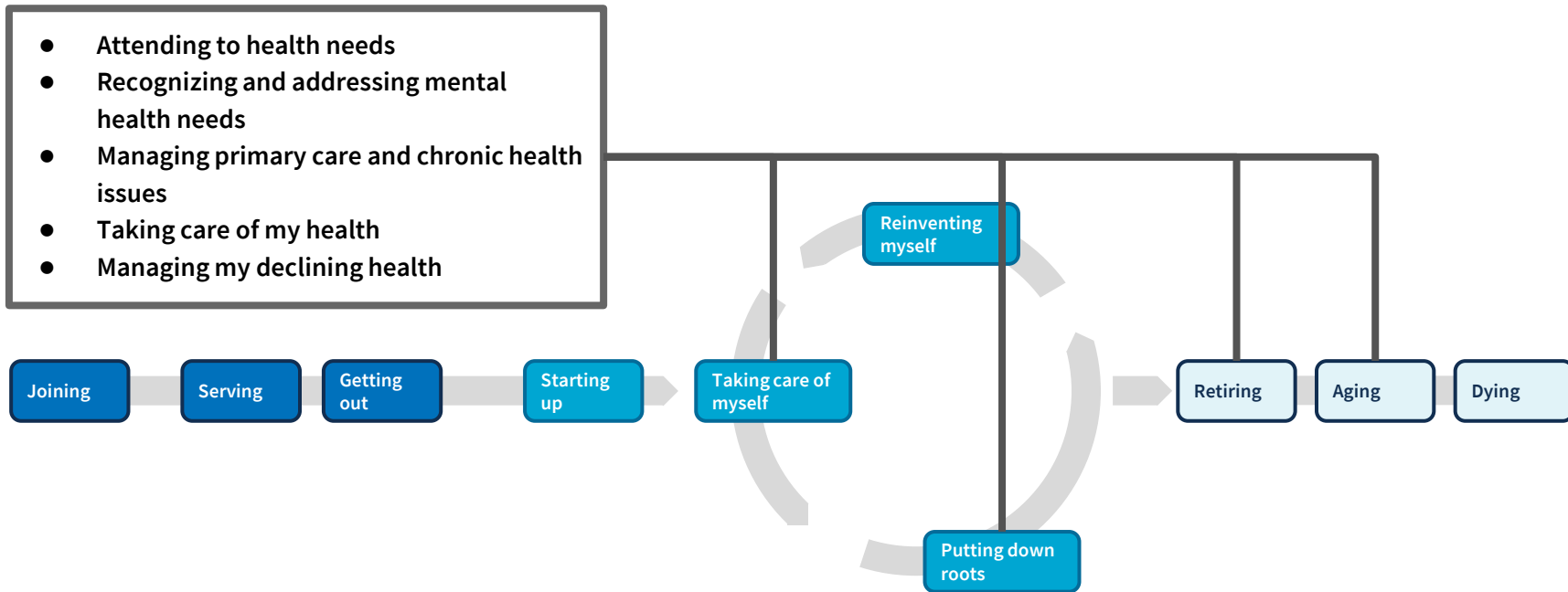
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How this research maps to the Veteran journey

Title of the research | mm dd, yyyy



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

Title of the research | mm dd, yyyy

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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Methodology

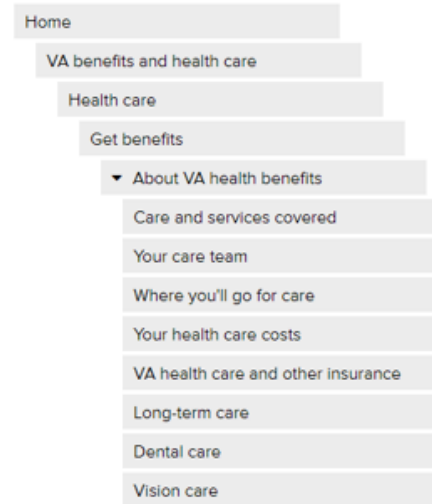
- We utilized an online tool called Treejack developed by Optimal Workshop
- This tool allows us to collect data on how participants navigate a menu structure to find the answers to questions/tasks
- Participants were asked to complete 10 tasks by navigating a menu structure and indicating where they would be able to find the answer
- Participants were started at the top of the menu for each task with the menu fully collapsed
- Tasks were randomized to avoid bias from learning the tree as the test progressed

Example tree test task

Task 2 of 12

[Skip this task](#)

You want to know what types of services and support you can get for your mental health needs.



Participants

6 cohorts of Veterans - 45 completions

- 23 have used MHV in last 12 months
- 22 have not used MHV in the last 12 months (not required to have VA health care)
- 54 attempted, 10 abandons, 4 removed

Demographics requested

- Participants recruited represented a diverse sample of Veterans composed of varying ages, races, genders, geographical locations, education levels, and cognitive abilities.
- Optimal workshop does not currently support assistive screen readers, so participants that utilize assistive tech were not recruited in this test.



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Topics and structure tested

Tasks were chosen to represent a mix of key content located within various sections of the experience. The structure presented focused on core features.

Task	Target content
1. You drove to see your VA primary care physician and want to get paid back for the cost of gas.	Travel pay
2. You saw your primary care provider last month and want to review what was decided for next steps in your care.	After-visit summary
3. You need to request a refill for a prescription you get from VA by mail.	Prescription refills
4. You want to know the name of the prescription that you stopped taking last summer for a skin condition.	Expired prescription
5. You want to find the results of a recent MRI you had done.	Medical images
6. You need to know when you had your last tetanus shot.	Vaccine history
7. You want to know what your blood pressure was the last time you had it taken at a VA medical facility.	Recent vitals
8. You want to get a copy of your VA health records for your personal files.	Medical records
9. You need to order new batteries for your hearing aid.	Hearing aid batteries
10. You recently lost your ID card for your Veteran health care and need to get a new one.	Veteran ID card

Information architecture – top level

My Health

Appointments

Messages

Medications

Test results

Copay bills

Medical equipment and supplies

Health history

Medical records

My health benefits

News and events



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▼ My health
▼ Appointments
↳ Start scheduling
▼ Upcoming appointments
↳ Complete pre-appointment forms
↳ Check-in for an appointment
↳ Join telehealth visit
↳ Cancel appointment
↳ Reschedule appointment
↳ Pending appointments
▼ Past appointments
↳ Review after-visit summary
↳ Request travel reimbursement
▼ Messages
↳ Start a new message
↳ Inbox
↳ Drafts
↳ Sent
↳ Archived
↳ My folders
▼ Medications
▼ Current medications and allergies
↳ Refill prescription
↳ Track prescription
↳ Past medications
▼ Test results
↳ Lab and test results
↳ Medical images and reports
↳ Copy bills

▼ Medical equipment and supplies
↳ CPAPs machines and supplies
↳ Hearing aid supplies and repairs
↳ Orthopedic supports and accessories
↳ Prosthetic socks
▼ Health history
↳ Allergies
▼ Care notes and summaries
↳ Admissions summaries
↳ After-visit summaries
↳ Clinical notes
↳ Discharge summaries
↳ Treatment plans
↳ Health conditions
↳ Vaccines
↳ Vitals
▼ Medical records
↳ Download my medical record (Blue Button)
↳ Share my health summary with a non-VA provider
↳ Manage my electronic medical record sharing options

▼ My health benefits
↳ Veteran copay rates
↳ Veteran care and services covered
↳ Update VA health benefits information (VA Form 10-10EZ)
↳ Get a Veteran Health Identification Card (VHIC)
↳ Download IRS 1095-B tax form
↳ Request a decision review
↳ Check my claim or appeal status
▼ News and events
↳ In the Spotlight health news
↳ Sign up for the My health newsletter
↳ Volunteer programs

Common metrics and data points in tree tests

First click/click paths

- The first clicks a participant makes generally indicates where they expected to find the information
- Deeper click paths can show you where participants believe information should be, and where they are getting hung up

Success rates and Directness

- Success rate = The percent of participants that selected the correct answer, regardless of how they got there.
- Directness = The percent of participants that went directly to an answer without backtracking, regardless if the answer was right or wrong

These 2 metrics are most often looked at together when analyzing a tree test

- High success with low directness indicates that participants bounced around to find the answer, the path or the answer wasn't clear
- Low success and high directness indicates that participants went directly to the wrong answer, they had high confidence in incorrect selections

Other metrics used in tree testing - i.e. time taken per task, skip rate, etc – can also be indications of where things are challenging

It's not about the pass/fail of a task, it's about the insights we collect!

- Failed tasks provide helpful insights in what is and is not working
- Always keep in mind that all labels and parts of a structure can impact a tasks results. For example, a section of the tree may be perfectly labeled and structured, but if another part has a misleading label, it can draw visitors away.



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Key findings

1. The different sections containing health and medical records information had some overlap in meaning, but were still successful tasks
2. The “Appointments” section was not the primary place Veterans looked for post-appointment tasks such as travel pay or after-visit summaries
3. Veterans looked for both current and past prescription information within the “Medications” section
4. It is unknown if Veterans understand what to expect within the “My health benefits” section
5. The placement and labeling of “vitals” is not entirely clear to Veterans

Finding 1: The different sections containing health and medical information have some overlap in meaning, but were still successful tasks

- We tested 5 items related to health and medical information that were placed within the 3 separate areas – Test results, Health history, and Medical records
- While most Veterans navigated to and selected answers in the correct section, there was consistently a small number of participants that navigated to the “Medical records” section for these tasks

	Where did Veterans first navigate to? (First clicks)		
Tasks	Test results	Health history	Medical records
After-visit summary		33%	31%
Vaccine history		40%	40%
Recent vitals	42%	31%	18%
Medical images	71%		16%
Medical records	7%	13%	78%

Highlighted and bold indicates the preferred path

Blank indicates <2%

Finding 2: The “Appointments” section was not the primary place Veterans looked for post-appointment tasks such as travel pay or after-visit summaries

- Veterans primarily navigated to and selected answers in areas other than “Appointments”, however there was still a significant number of Veterans that navigated to “Appointments” for these tasks
- Veterans not enrolled in VA health care were twice as likely to look in “Appointments” than Veterans currently enrolled in VA health care
- For the after-visit summary task, over 50% of Veterans correctly selected the “After-visit summary” option in either “Health history” or “appointments”, indicating there is likely some understanding or familiarity with that label

	Where did Veterans first navigate to? (First clicks)		
Tasks	All Veterans (45)	Enrolled in VA health care (23)	Not enrolled in VA health care (22)
Travel pay	<ul style="list-style-type: none">• 51% My health benefits• 36% Appointments	<ul style="list-style-type: none">• 61% My health benefits• 26% Appointments• 13% Copay bills	<ul style="list-style-type: none">• 45% Appointments• 41% My health benefits
After-visit summary	<ul style="list-style-type: none">• 33% Health history• 31% Medical records• 20% Appointments	<ul style="list-style-type: none">• 39% Medical records• 30% Health history• 13% Appointments	<ul style="list-style-type: none">• 36% Health history• 27% Appointments• 23% Medical records

Bold indicates the majority path

Finding 3: Veterans looked for both current and past prescription information within the “Medications” section

- For this round of testing, the label of the previous “Prescriptions” section was changed to “Medications” to better encompass all of the prescribed and over the counter medications that patients may be taking
- Over 74% of all Veterans looked to the “Medications” section to find information on both current and past prescriptions
- There was a small percentage of Veterans that looked in “Health history” for information on an old prescription

	All Veterans (45)	
Tasks	Where did Veterans first navigate to? (First clicks)	What did Veterans select as an answer?
Refill prescription	<ul style="list-style-type: none">• 87% Medications	<ul style="list-style-type: none">• 84% Medications > Current medications and allergies > Refill prescription
Expired prescriptions	<ul style="list-style-type: none">• 74% Medications• 13% Health history	<ul style="list-style-type: none">• 82% Medications > Past medications

Finding 4: It is not clear if Veterans understand what to expect within the “My health benefits” section

- There were only 2 tasks – travel pay and veteran health ID card – where a notable number of Veterans navigated to and made selections in the “My health benefits” section (>4% visited or made a selection)
- Veteran health ID card was placed in this section, and saw a high success rate
- This section also contains general benefit information, which in previous tests also indicated some level of challenge, and will need continued evaluation

	All Veterans (45)	
Task	Where did Veterans first navigate to? (First clicks)	What did Veterans select as an answer?
Travel pay	<ul style="list-style-type: none">• 51% My health benefits• 36% Appointments• 9% Copay bills	<ul style="list-style-type: none">• 33% My health benefits > Veteran care and services covered• 33% Appointments > Past appointments > Request travel reimbursement• 16% Copay bills
Veteran health ID card	<ul style="list-style-type: none">• 71% My health benefits• 16% Medical records	<ul style="list-style-type: none">• 78% My health benefits > Get a Veteran Health Identification Card (VHIC)• 13% Messages > Start a new message

Finding 5: The placement and labeling of “vitals” is not entirely clear to Veterans

- Veterans were somewhat divided in where they first looked - “Test results” and “Health history”
- Most Veterans selected answers within “Health history”, although 1/3 of them were incorrect indicating that “vitals” may not be entirely clear (i.e. Veterans may not know what is and is not a “vital”)
- Current MHV has vitals as a separate option from both “Labs and tests” and “Health history”
- This could be a result of a label, placement, or phrasing of the question and this topic will benefit from gaining qualitative feedback from Veterans

	All Veteran (45)	
Task	Where did Veterans first navigate to? (First clicks)	What did Veterans select as an answer?
Vitals	<ul style="list-style-type: none">• 42% Test results• 31% Health history• 18% Medical records	<ul style="list-style-type: none">• 49% Health history<ul style="list-style-type: none">• 31% > Vitals• 18% > Other answers• 27% Test results > [various answers]• 11% Medical records > Download my medical record (Blue Button)



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Next steps

1. Finalize labeling and structure for core features based on test results and build into designs
 - In progress and will be worked into ongoing design efforts
2. Move to qualitative research to gain further insights and feedback and refine
 - Additional research will be incorporated into product design cycles for each feature/tool
3. Continue to build out and test IA to support additional features
 - Methodology and timing TBD based on needs



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Appendix

Full menu/structure evaluated

▼ My health
▼ Appointments
└ Start scheduling
▼ Upcoming appointments
└ Complete pre-appointment forms
└ Check-in for an appointment
└ Join telehealth visit
└ Cancel appointment
└ Reschedule appointment
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Overall results

Overall, 7/10 tasks had high success rates (> 70%), while 2/10 tasks had very poor success rates (< 50%)

In addition, both groups of participants – MHV users and non-MHV users – had similar tasks rates in 8/10 tasks (<10% difference)

Group	All Veterans (45)				Current MHV user (23)		Not current MHV user (22)	
Task	Success	Directness	Direct success	Direct fail	Success	Directness	Success	Directness
Overall average	75%	77%	60%	16%	74%	75%	75%	78%
Travel pay	33%	44%	18%	27%	26%	52%	41%	36%
After-visit summary	69%	62%	44%	18%	65%	52%	73%	73%
Prescription refills	84%	87%	76%	11%	83%	87%	86%	86%
Expired prescription	84%	87%	73%	11%	83%	87%	86%	86%
Medical images	84%	82%	71%	11%	87%	78%	82%	86%
Vaccine history	84%	87%	71%	16%	91%	78%	77%	95%
Recent vitals	42%	67%	24%	42%	43%	65%	41%	68%
Medical records	87%	82%	71%	11%	87%	87%	86%	77%
Hearing aid batteries	100%	96%	96%	0%	100%	91%	100%	100%
Veteran ID card	78%	73%	60%	13%	74%	74%	82%	73%



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