IRIS/'Ask a question' usability testing

Research share

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Every year the VA receives over 600,000 messages via IRIS (https://iris.custhelp.va.gov/) from Veterans and others asking for help.

How might we use user experience design in partnership with modern technology to help ensure those Veterans get the help they need quickly and comprehensively?
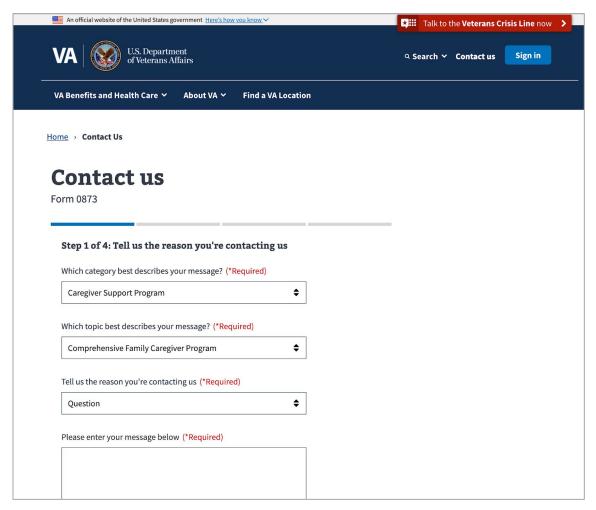
Context

Background

- Due to mounting operating costs with the existing Oracle system, VEO kicked off an initiative to migrate to more modern technologies and improve the experience for end users of IRIS and GI Bill
- The ThoughtWorks team has been working since mid-July 2020 with an anticipated launch in Summer 2021
- We completed usability testing in late December 2020 of our work to date; our project repository on Github has all of the research work including the larger usability testing report

current state IRIS

IRIS challenges and context

- Consolidate 200+ topics in drop down in current IRIS
- Create a better inquiry experience in light of the Get Help initiatives (chatbot, Resources & Support etc.)
- Understand authentication and conditional logic for the VA Lines of Business (work to come)
- Possible backend complexity migrating to new system (off Oracle onto Microsoft)

Redesigned IRIS

Research overview

- Initial context with onboarding
  - Process: VSP Collaboration Cycle and VA Subject Matter Experts
  - Tools: VA Design System, Forms library and tech infrastructure
  - Data: Understanding analytics, success metrics (throughout project)
- Initial general interviews with 7 Veterans in August 2020
  - How they used IRIS (Web vs. mobile) and where
  - Pain points in current state IRIS
  - What products they use (general use of IRIS, FAQs and how they get help in general)
- Ongoing discussions with VA Lines of Business and others
  - Requirements gathering around what content is useful to help address the inquiry
  - User journey work to understand how IRIS should work with other Get Help initiatives
- Usability testing with 8 Veterans with the redesigned product in Dec 2020
  - Understand any changes to make before launch

Goal and research questions

Our goal: modernize IRIS by simplifying content and utilizing modern design patterns.

We hypothesized that the VA Design System's use of chapters etc. would help create a better experience. The research questions to see if we've met our goal included:

- Content strategy:
  - Do users understand the content in the form (especially the drop down menus) and how to fill in each field (the right content in the components?) Do users find having a 'Review the form' page valuable? Do users find merging the GI Bill form and the IRIS form into one form acceptable?
- Information design:
  - Do users find having chapters valuable, and if so, are the form's chapters the right number and right content on each chapter? Do users feel the form's fields are organized on each chapter in an intuitive manner?
- Interaction design:
  - Do users log in to use the application? Do users understand how the information is displayed in a clear and understandable manner (the right UI controls in the components)? What do users think will happen after they've submitted and what do they want to happen (and what kind of information to see)? Would users use the form on their mobile device - why or why not?
- Navigation/Information architecture
  - Are users able to navigate through the form easily and complete the form?

Methodology and demographics

- Hour long remote usability testing sessions via GoToMeeting with 8 Veterans
- Test: 'fill out the form to send a message about glasses', with some using Web and some mobile
- Goal: validate if people could complete the form and whether everything on the page was intuitive - easy to use, well understood and delightful.
- Follow up questions about form, secure messaging, how authentication and evolution of search would shape what they saw, and the redesigned Contact us page

Participants:
- Ages:
  - 3 participants 35 - 44
  - 3 participants 45 - 54
  - 1 participant over 65
  - 1 participant no age stated
- Geography:
  - CA, FL, MN, NC, TN, TX
- Gender:
  - 5 women, 3 men

Findings

Key findings

Things that worked

We received positive validation:

- Participants were able to successfully submit the form
- Form has the right number of chapters
- Review page is useful to keep so people are able to review their entries before submitting
- Confirmation message is useful to keep so people know the system received their message
- Combining GI Bill contact us and IRIS contact us into one form will simplify life for Veterans

Things to improve

We found a few areas to revise before launch:

- Content was confusing for some participants
- Number of options in some of the drop down menus are extensive which makes the list hard to navigate
- Some felt the number of fields was excessive

Content was confusing for some participants

Participants questioned some of the supporting text (''respondent burden'') and some participants struggled with the copy in the drop down menus. Additionally, because of the structure of drop downs, it's not intuitive necessarily where things 'live' naturally (information hierarchy) without a user having to interact with the menus and 'learn' the hierarchy

Participant #4: "Closest would be medical devices but the I don't feel accurately describe my glasses, if I had to pick one, I'll use "Prosthetics" - it's not correct, but I will choose that"
Participant #11: "Would glasses be considered Medical Devices? I'll try that since it doesn't really fit in anything else"

Implication:
If people select the 'wrong' option the inquiry may need to be rerouted manually by a contact center agent, adding extra time for an inquiry to be resolved. Users may default to picking up the phone rather than use IRIS, or become frustrated, thus lowering the perception of the VA in the mind of users.

Action:
How might we help users understand the content so they can make the right selection?
- ○ Standardize the content to fit VA content strategy
- ○ Explore having a glossary or way to have a reference people have handy to learn what the options mean
- ○ Add a sentence introducing what information is captured ('we'll asking you about your question, then capture your information - this should take about 10 minutes') at the very top of the form to explain what respondent burden is - to help users feel aware of the process and understand the terminology

Number of options in some of the drop down menus are extensive which makes the list hard to navigate

When a user selects 'Health and Medical Issues and Services' then Medical Issues at a Facility, they'll get a list of Medical Centers. The existing IRIS has approximately 230 entries and the redesigned IRIS is using the medical facilities list on VA.gov with approximately 1040 entries

Participant #1: "This dropdown of the medical facilities is a lot to go over, not my favorite way of looking at it. f you have a weird VA in the chunky middle (of the list of locations) it might be harder to find"

Participant #8: "Can't I just type? It would make it easier if while I was in that box, I could type a few letters to start the search"

Participant #11: "Start with state so [I] don't have to find [my] way through Ohio and PA to find his clinic in VA"
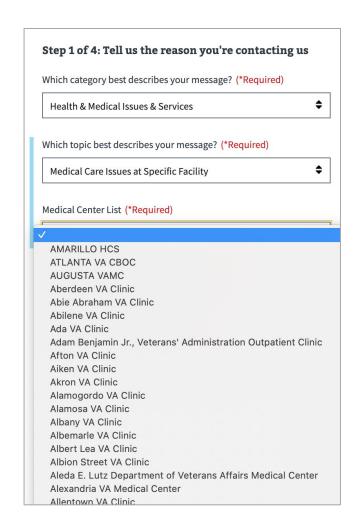
Implication:
Users will become frustrated by the experience of having to navigate through this many options. Not having modern search functionality may affect user's perception of the VA brand

Action:
How might we improve the list of centers experience?

- Add copy that says 'type first letter of your location' as a label
- Explore adding a drop down menu for states or some way to filter by state first - check with other teams
- Alphabeticalize the Medical Center list to help with readability; we're starting with the PATS-R compliant list but should validate if cleaning up the data is possible.
- Many of the Medical Centers are all caps - make them Sentence Case instead to help with readability. Do we need to sort by type of Medical Center as well?

Step 1 of 4: Tell us the reason you're contacting us

Which category best describes your message? (*Required)

| Health & Medical Issues & Services | ⇕ |

Which topic best describes your message? (*Required)

| Medical Care Issues at Specific Facility | ⇕ |

Medical Center List (*Required)

✓
AMARILLO HCS
ATLANTA VA CBOC
AUGUSTA VAMC
Aberdeen VA Clinic
Abie Abraham VA Clinic
Abilene VA Clinic
Ada VA Clinic
Adam Benjamin Jr., Veterans' Administration Outpatient Clinic
Afton VA Clinic
Aiken VA Clinic
Akron VA Clinic
Alamogordo VA Clinic
Alamosa VA Clinic
Albany VA Clinic
Albemarle VA Clinic
Albert Lea VA Clinic
Albion Street VA Clinic
Aleda E. Lutz Department of Veterans Affairs Medical Center
Alexandria VA Medical Center
Allentown VA Clinic

Some felt the number of fields was excessive

The IRIS form captures the inquiry, Veteran info and contact information about the person submitting. We started with the existing set of fields, simplified it and asked participants if any fields seemed irrelevant or if any fields were missing that they expected to see. Many fields affirmed that fields felt 'extra' and quickly started to look for required fields in order to do the bare minimum to submit the form.

Participant #1: "they need to let go of all this asking for your SSN, the DoD has stopped asking, I'm over it, stop asking for my full social"

Participant #4: "Why do I have to add my service start date for [submitting a question about] my glasses?"

Participant #11: "The page with all the non-mandatory fields feels like superfluous information. [On Branch of Service being a required field]: "Why is that significant in this setting? Is there a Marine desk that will work with me?"

Some felt the number of fields was excessive

Implication:
As time required to fill out the form increases, so does frustration by users who can feel this experience stands in the way of them receiving help.

Action:
How might we simplify the number of fields?

- Reevaluate which fields are absolutely necessary by a) looking at what lines of business actually require to take action on and b) what data we have in Oracle to understand which fields are actively being filled out.
- Reconsider how many are required especially as Lines of Business are requesting to make more conditional logic and required fields a new standard for the form. As these more conditional logic decisions shape the UI, more usability testing before launch should be mandatory to ensure user frustration doesn't translate into people not filling out the form and calling instead.

Next steps

The work ahead

- SRA will be taking over to build IRIS in Microsoft Dynamics
- Another round of usability testing before launch is recommended
  - All content from lines of business integrated into IRIS
  - Conditional UIs for lines of business
    - required fields, additional fields, topic based authentication and file attachments should be validated with users to ensure they're comfortable
  - Authentication - confirm with users especially around conditional UIs
- Feedback from VA SMEs should be integrated as well

YOU HAVEN'T EVEN SEEN MY FINAL FORM

It's been a honor working on this and working with and for Veterans and we wish you the best of luck on a successful launch. We're rooting for you!

Obligatory animated gif, now with science humor