

Design review

Sprint 6 — July 22, 2022

Agenda

- Health Hub
 - Research synthesis
 - Research phase #2
- 1095-B
 - Prototype
 - Mobile Screens

Health Hub — IA Tree Test Research Findings

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Background and goals

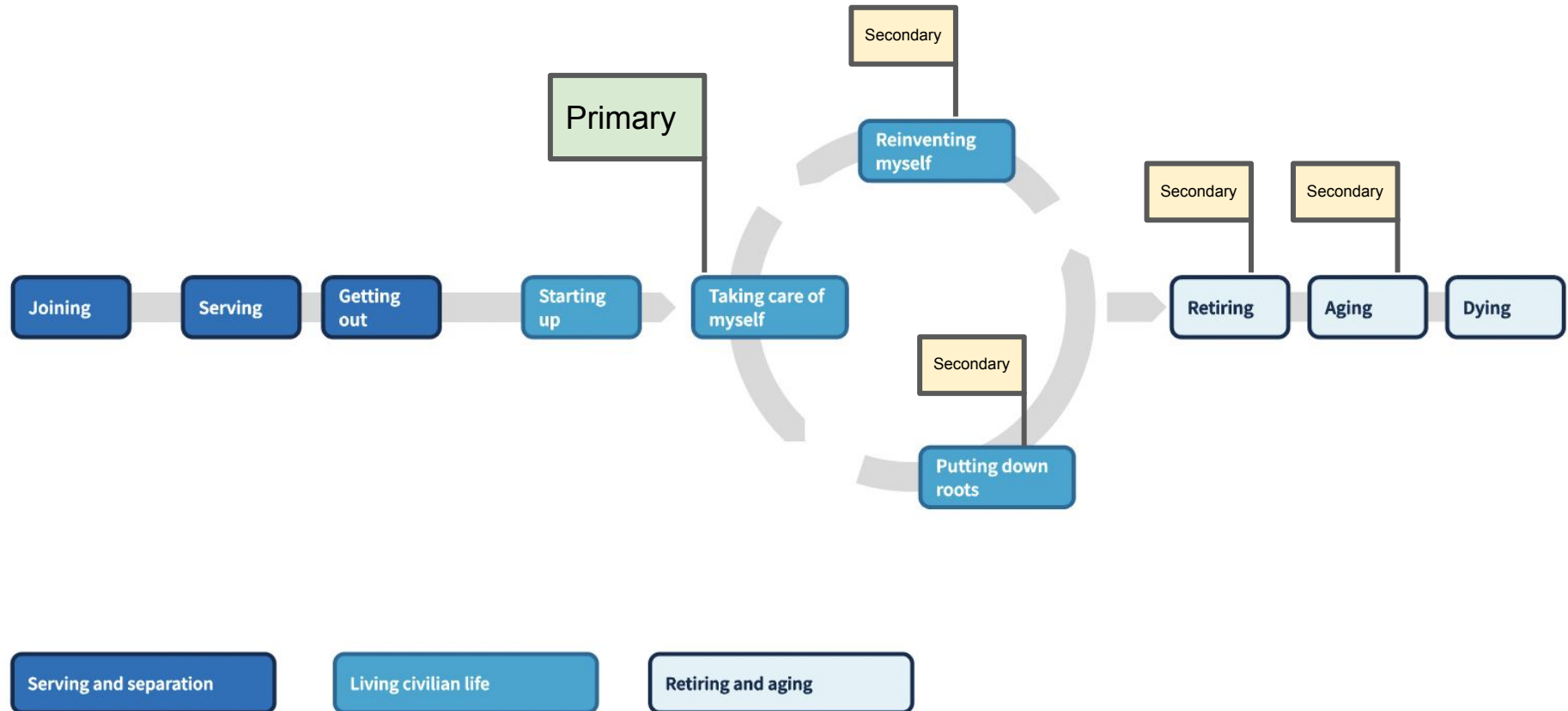
As the team considers where to include the Health Apartment on VA.gov, this research is an effort to update and improve the benefits-related information architecture of VA.gov.

Goals:

How we might create an experience that allows Veterans to easily find the content and tools they need based on where they are in their VA health care journey:

- learning about the benefit
- applying for the benefit
- getting started with the benefit
- or managing their care and health benefits?

How this research maps back to the Veteran journey



OCTO-DE goals this research supports

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

VA



U.S. Department of Veterans Affairs

Participant Demographics – Veterans

Hypothesis 0: 51 completed

Hypothesis 1: 50 completed, 3 abandoned

Baseline: 47 completed

81 participants are enrolled in VA health care.

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

- Have a cognitive disability
- Live in a rural area
- Have other than honorable discharge
- Are of immigrant origin
- Identify as Latinx or Asian
- Use assistive technology

Health Hub IA Tree Test (Veterans)

final # of participants			151	# of AT users							0	# of no shows							3
Category	%	Target	Study	1	2	3	4	5	6	7	8	9	10	11	12	13	14		
Age 55-64+	50.00%	76	78	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Cognitive Disability	50.00%	76	6	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Mobile user	50.00%	76	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Rural	25.00%	38	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
No degree	25.00%	38	33	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Other than honorable	21.00%	32	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Immigrant origin	17.00%	26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Women	10.00%	16	74	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
Expat (living abroad)	0.40%	1	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%	23	26	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Hispanic	12.00%	19	7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Biracial	3.90%	6	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Asian	3.00%	5	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Native	0.30%	1	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	--%	1	11	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	0
Nonbinary, gender fluid, gender	--%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

[Participant tracker](#)

Participant Demographics – Caregivers

Hypothesis 0: 26 completed

Hypothesis 1: 24 completed

Baseline: 12 completed

Findings may not include the range of perspectives from the following underserved groups:

- Have a cognitive disability
- Live in a rural area
- Are of immigrant origin
- Identify as Latinx or Native
- Use assistive technology

Health Hub IA Treejack Test - Caregivers																				
final # of participants		56	# of AT users								0	# of no shows								0
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+	50.00%	28	25	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Cognitive Disability	50.00%	28	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Mobile user	50.00%	28	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Rural	25.00%	14	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
No degree	25.00%	14	21	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Other than honorable	21.00%	12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Immigrant origin	17.00%	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Women	10.00%	6	33	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Expat (living abroad)	0.40%	1	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%	9	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Hispanic	12.00%	7	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Biracial	3.90%	3	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
Asian	3.00%	2	2	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			
LGBTQ+		LGBTQ+ Veterans are 5 times as likely to have PTSD																		
Gay, lesbian, or bisexual	--%	1	5	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, gender	--%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			

[Participant tracker](#)

Key findings

1. Hypothesis 0 performed best on “manage tasks.”
2. For “get” tasks, there wasn’t a clear hypothesis that outperformed the other.
3. Hypothesis 0 had the most direct success with both Veterans and caregivers.
4. Hypothesis 1 tends to perform poorly except with caregiver cohorts
5. For Veterans without health care, H0 performed better in direct success
6. The highest performing tasks for Hypothesis 0 were task 8* (Veterans – medical bill) and task 7** (Caregivers – medical records).
7. The highest performing task for Hypothesis 1 was task 9* ** (Veterans and Caregivers – prescriptions).
8. Hypothesis 0 performs poorly on “get” tasks likely because of labeling within the tree

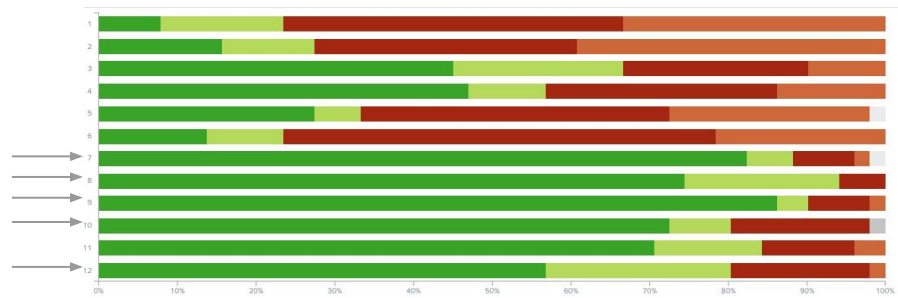
*Task 6 was eliminated from analysis

** Task 5 was eliminated from analysis

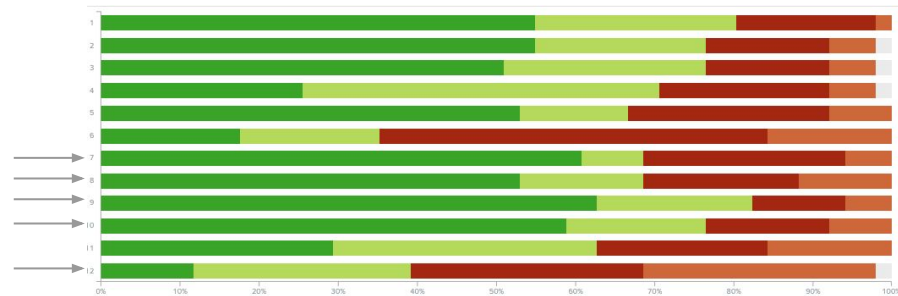
Finding detail #1

Hypothesis 0 performed better on “manage” tasks

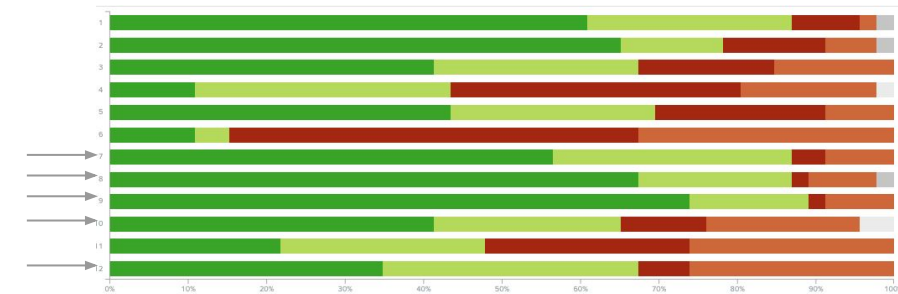
- First click after “VA benefits and health care”
 - **Task 7 (Records):** “My Health” (65%)
 - “Records” (33%)
 - **Task 8 (Billing):** “My Health” (84%)
 - “Service member benefits” (4%)
 - **Task 9 (Prescriptions):** “My Health” (90%)
 - “Service member benefits” (2%)
 - **Task 10 (Messaging):** “My Health” (86%)
 - “VA health” (8%)
 - **Task 12 (Travel pay):** “My Health” (86%)
 - “Service member benefits” (6%)



Hypothesis 0



Hypothesis 1



Baseline

Findings detail #2

- For “get” tasks, there wasn’t a clear hypothesis that outperformed the other.

Caregivers + Veterans

			10% threshold							
			Total success				Direct success			
			H0 compared to Baseline	H1 compared to Baseline	H1 compared to H0	Overall	H0 compared to Baseline	H1 compared to Baseline	H1 compared to H0	Overall
→ Task 1,1	G	V Qualify for health care	-61.3	-8.0	53.3	Baseline/H1	-49.9	-9.0	40.9	H1/Baseline
→ Task 4,5	G	V Costs for health care	-30.5	4.6	35.1	H1/Baseline	-12.5	-2.9	9.6	Baseline/H1
→ Task 5,6	G	V Costs for health care	5.5	16.5	11.0	H1	-0.2	4.6	4.8	H1/H0/Baseline
Task 7,7	M	V Records to community care	5.4	-17.4	-22.8	H0/Baseline	20.3	0.4	-20.0	H0
Task 8,8	M	V Pay medical bill	10.6	-13.5	-24.1	H0	9.0	-14.6	-23.6	H0
Task 9,9	M	V Refill prescription	3.7	-7.6	-11.2	H0	15.7	-9.5	-25.2	H0
Task 10,10	M	Chat with Dr online	16.9	8.4	-8.4	H0	31.4	12.9	-18.5	H0
Task 11,12	M	Travel pay	9.4	-25.7	-35.1	H0/Baseline	17.6	-20.8	-38.4	H0
Task 12, 11	G	V Paid for community care	26.2	10.3	-15.9	H0/Baseline	35.5	1.9	-33.5	H0

Findings detail #3

- Hypothesis 0 had the most direct success with both Veterans and caregivers.

Caregivers + Veterans

			10% threshold							
			Total success				Direct success			
			H0 compared to Baseline	H1 compared to Baseline	H1 compared to H0	Overall	H0 compared to Baseline	H1 compared to Baseline	H1 compared to H0	Overall
Task 1,1	G	V Qualify for health care	-61.3	-8.0	53.3	Baseline/H1	-49.9	-9.0	40.9	H1/Baseline
Task 4,5	G	V Costs for health care	-30.5	4.6	35.1	H1/Baseline	-12.5	-2.9	9.6	Baseline/H1
Task 5,6	G	V Costs for health care	5.5	16.5	11.0	H1	-0.2	4.6	4.8	H1/H0/Baseline
Task 7,7	M	V Records to community care	5.4	-17.4	-22.8	H0/Baseline	20.3	0.4	-20.0	H0
Task 8,8	M	V Pay medical bill	10.6	-13.5	-24.1	H0	9.0	-14.6	-23.6	H0
Task 9,9	M	V Refill prescription	3.7	-7.6	-11.2	H0	15.7	-9.5	-25.2	H0
Task 10,10	M	Chat with Dr online	16.9	8.4	-8.4	H0	31.4	12.9	-18.5	H0
Task 11,12	M	Travel pay	9.4	-25.7	-35.1	H0/Baseline	17.6	-20.8	-38.4	H0
Task 12, 11	G	V Paid for community care	26.2	10.3	-15.9	H0/Baseline	35.5	1.9	-33.5	H0

Findings detail #4

- Hypothesis 1 tends to perform poorly except with caregiver cohorts

Caregivers			10% threshold							
			Total success				Direct success			
			H0 compared to Baseline	H1 compared to Baseline	H1 compared to H0	Overall	H0 compared to Baseline	H1 compared to Baseline	H1 compared to H0	Overall
Task 1	G	V Qualify for health care	-46	2	48	H1/Baseline	-33	-3	30	Baseline/H1
Task 2	G	Dental benefits	-10	-13	-3	Baseline	11	5	-6	H0/H1
Task 3	G	Mental health	-1	35	36	H1	-1	5	6	H1/Baseline/H0
Task 4	G	V Costs for health care	-5	26	31	H1	8	40	32	H1
Task 5	G	V Costs for health care	-1	9	10	H1	-9	-2	7	Baseline/H1/H0
Task 6	G	C Get health care	21	-7	-28	H0	30	-5	-35	H0
Task 12	G	V Paid for community care	11	8	-3	H0/H1	7	-10	-17	H0
Task 11	M	Travel pay	14	-8	-22	H0	15	-10	-25	H0
Task 7	M	V Records to community care	21	-7	-28	H0	5	-11	-16	H0/Baseline
Task 8	M	V Pay medical bill	34	14	-20	H0	22	-5	-27	H0
Task 9	M	V Refill prescription	17	0	-17	H0	34	6	-28	H0
Task 10	M	Chat with Dr online	26	10	-16	H0	35	8	-27	H0

Findings detail #5

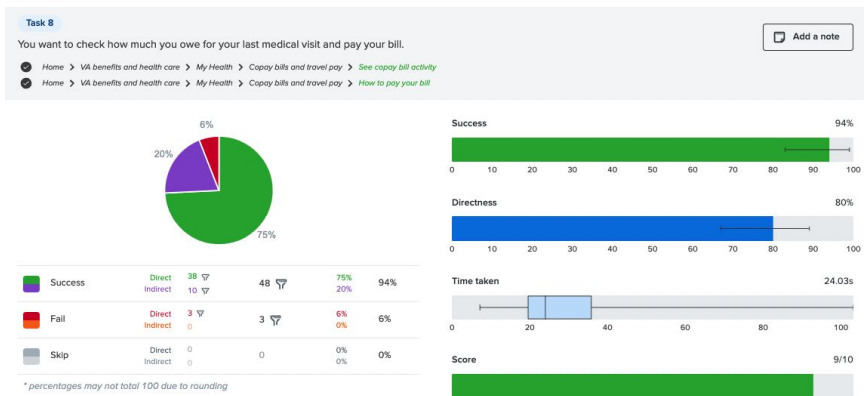
- For Veterans without health care, H0 performed better in direct success

Veterans without health care

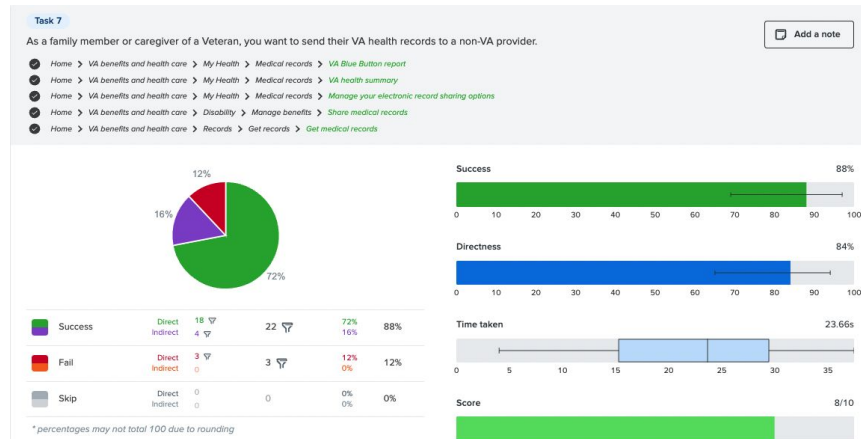
				10% threshold			
				Total success		Direct success	
				H0 compared to Baseline	H1 compared to Baseline	H1 compared to H0	Overall
Task 1	G	Qualify for health care		-56.5	-11.6	44.9	Baseline
Task 2	G	Enroll in health care		-65.5	-9.0	56.5	Baseline/H1
Task 3	G	Dental benefits		16.1	22.6	6.5	H1/H0
Task 4	G	Mental health		-1.8	15.3	17.1	H1
Task 5	G	Costs for health care		-36.3	13.2	49.5	H1
Task 11	G	Community care		45.2	32.3	-13.0	H0
Task 7	M	Records to community care		39.3	21.7	-17.6	H0
Task 8	M	Pay medical bill		-3.0	-23.8	-20.8	Baseline/H0
Task 9	M	Refill prescription		5.4	-5.3	-10.6	H0/Baseline
Task 10	M	Chat with Dr online		21.4	12.2	-9.3	H0/H1
Task 12	M	Travel pay		3.6	-34.4	-38.0	H0/Baseline

Finding detail #6

The highest performing tasks for Hypothesis 0 were task 8 (Veterans – medical bill) and task 7 (Caregivers – medical records)



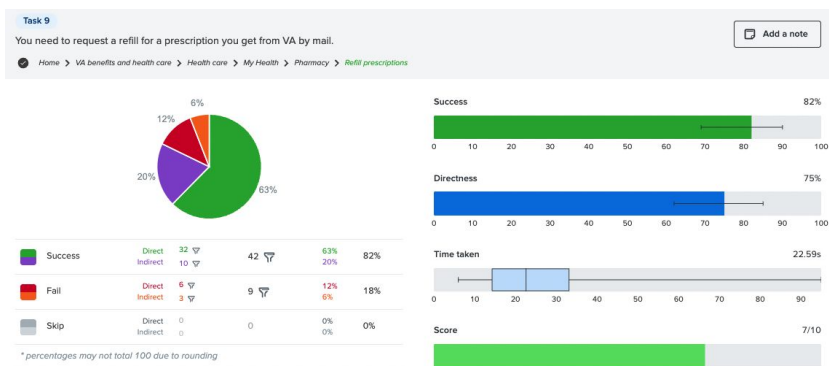
Veterans



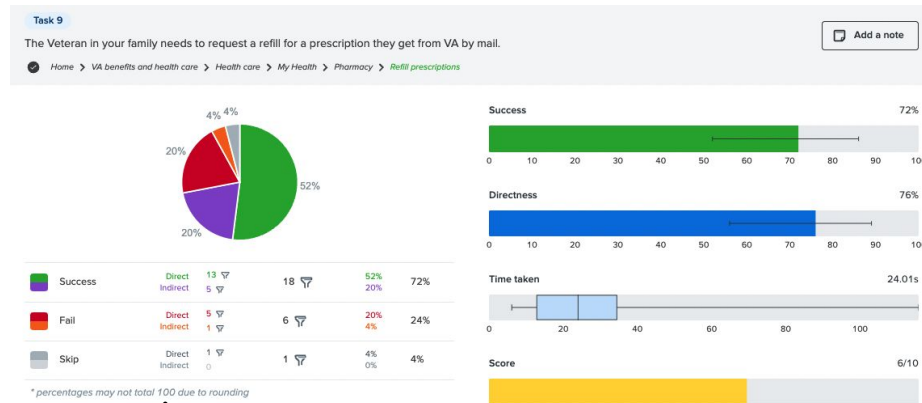
Caregiver

Finding detail #6

The highest performing task for Hypothesis 1 was task 9* **
(Veterans and Caregivers – prescriptions)



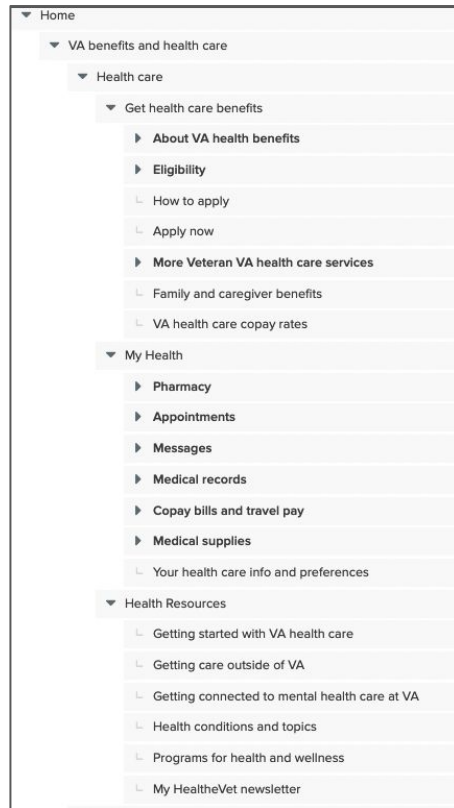
Veterans



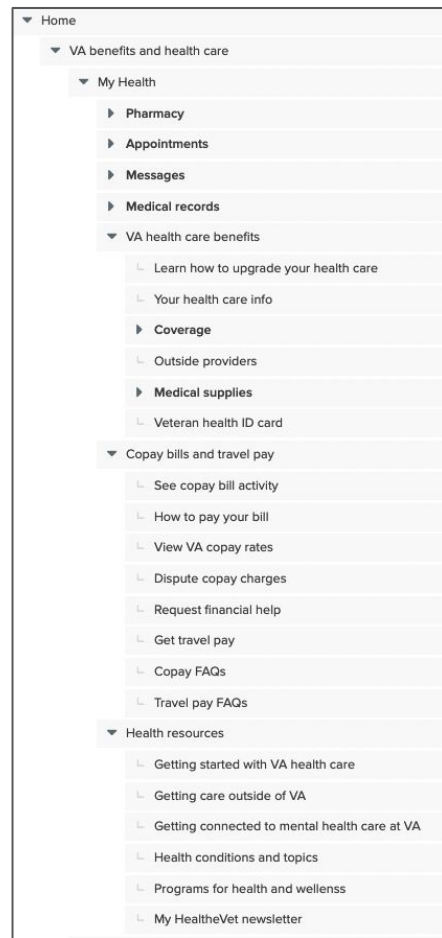
Caregivers

Findings detail #7

- Hypothesis 0 performs poorly on “get” tasks likely because of labeling within the tree
 - With “get” tasks living under “My Health,” this might be confusing to participants
- Hypothesis 1 uses “get health care benefits” while that information is buried in Hypothesis 0 under “Coverage” which is a little less clear.



Hypothesis 1



Hypothesis 0

Health Hub - Research Phase #2

Research plan & Conversation guide

- Moderated tree tests of both Hypothesis 0 and 1.
- 3 cohorts of 9 participants for each tree for recruitment, total 54 participants. Anticipate 2 no-shows per cohort.
 - 9 Veterans with health care and used MHV in the last 6 months
 - 9 Veterans without health care, but experience with VA benefits
 - 9 caregivers/family members
- Use same tasks (minus task re: disability and costs)

Timeline & Next steps

- July 25 – Final edits to Research Plan & Conversation Guide
- July 27 – Submit Research Plan for review
- July 29 – Meet with Perigean to discuss recruiting
- August 1–5 – Perigean recruits participants
- August 8 – Research with participants begins

1095-B

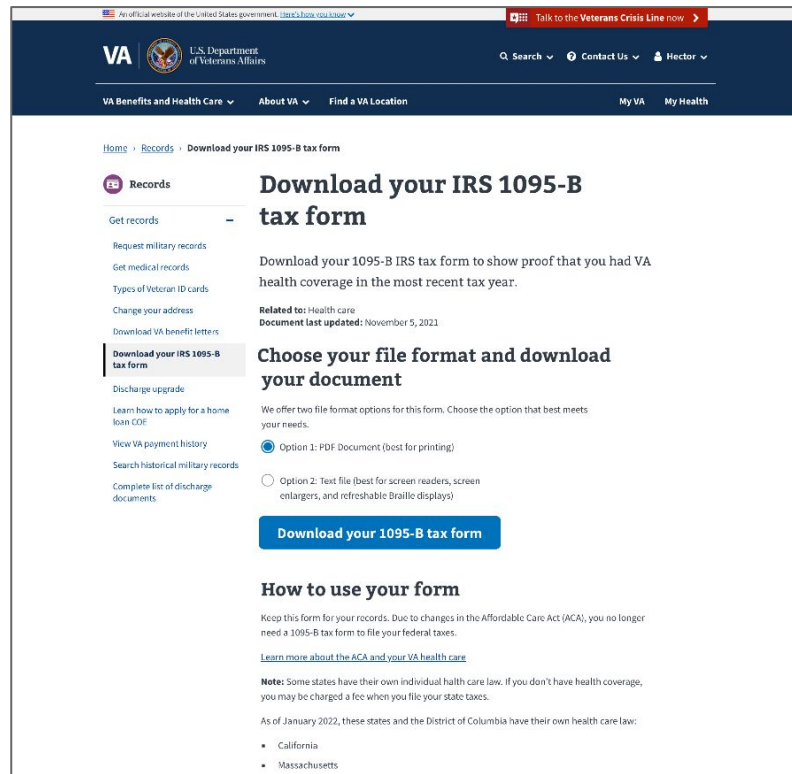
Updates:

1. Prototype for HEC documentation
2. MVP Mobile Screens
3. Update on Opt-In

Documentation Prototype

As part of the required HEC documentation, a video must be recorded, demonstrating the form download. A prototype was created for the video

- Shows MVP design (Hybrid file format download option, no Opt-In element)



[View Prototype](#)

MVP Design Mobile

As part of the required HEC documentation, a video must be recorded, demonstrating the form download. A prototype was created for the video

- Shows MVP design (Hybrid file format download option, no Opt-In element)



Records

In this section

Download your IRS 1095-B tax form

Download your IRS 1095-B tax form to show proof that you had VA health coverage in the most recent tax year.

Choose your file format and download your document

We offer two file format options for this form. Choose the option that best meets your needs.

☒ Option 1: PDF document (best for printing)

☐ Option 2: Text file (best for screen readers, screen enlargers, and refreshable Braille displays)

Download form

How to use your form

Keep this form for your records. Due to changes in the Affordable Care Act (ACA), you no longer need a 1095-B tax form to file your federal taxes.

[Learn more about the ACA and your VA health care](#)

Note: Some states have their own individual health care law. If you don't have health coverage, you may be charged a fee when you file your state taxes.

As of January 2023, these states and the District of Columbia have their own health care laws:

• California



Records

In this section

Download your IRS 1095-B tax form

Download your IRS 1095-B tax form to show proof that you had VA health coverage in the most recent tax year.

Choose your file format and download your document

We offer two file format options for this form. Choose the option that best meets your needs.

☒ Option 1: PDF document (best for printing)

☐ Option 2: Text file (best for screen readers, screen enlargers, and refreshable Braille displays)

Download form

1 Sign up for paperless delivery

We mail you a paper copy of your 1095-B form each year. If you want to stop getting paper forms, you can choose paperless delivery. We'll email you once a year when your new form is ready to download.

[Go to your VA.gov profile to choose 1095-B paperless delivery](#)

[View in Sketch](#)

Accessibility Analysis

The team reviewed the populated 1095-B PDF document with Angela Fowler.

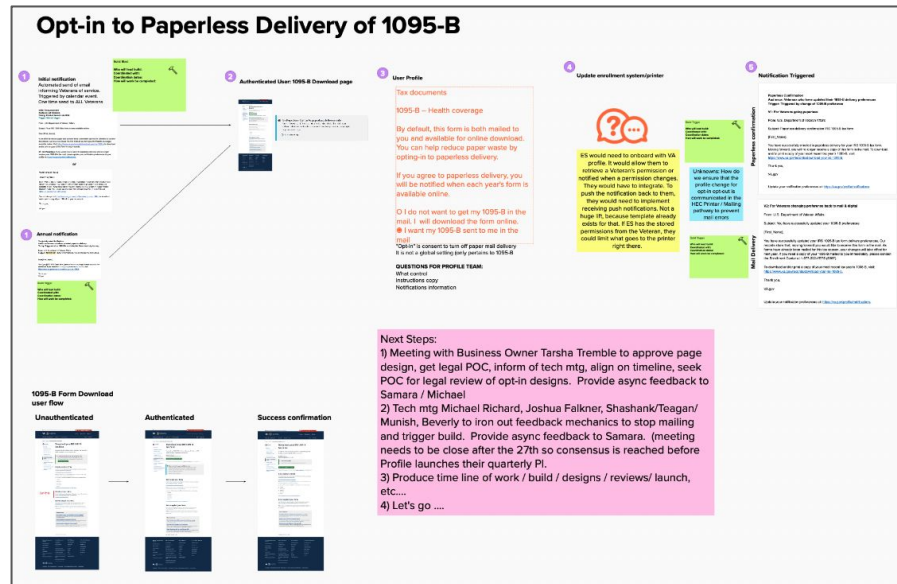
- The document in its original state is accessible to the screen reader, but following processing/data population, it loses that accessibility
- Next step is to understand what happens during document flattening that makes content inaccessible and solutions.

Options to investigate:

- **Create pdf in API without flattening (preferred)**
- Use HTML version instead of PDF version of 1095-B form
- Store entire PDFs in database as sent to us by Enrollment System
- Generate our own PDF replica from scratch

Notifications Process Map

- 6/16 spoke with Beverly Nelson, VANotify
- 6/17 spoke with Samara Strauss, VA Profile
- 6/23 synced with VANotify & Profile teams to discuss building triggers (Beverly Nelson, Michael Richard)
- Built process map based on details around flow that we received from VANotify & Profiles team.
- Annotated communication plan with government legal requirements.
- Outlined next steps that will need to be taken for technical on our side and profiles teams



Updated documentation

HEC Documents

IRS 1095-B Tax Form (Proof of Health Coverage) User Guide



April 2022
Department of Veterans Affairs
Office of Information and Technology (O&T)

IRS 1095-B Tax Form (Health Coverage)

In compliance with the Affordable Care Act (ACA), the IRS 1095-B tax form is provided to Veterans and the VA to show proof of health coverage through the VA. Your 1095-B, like other tax documents, shows your name, address and social security number; it also shows a checked box for every month that you had health coverage through the VA for the previous year. Changes to the Affordable Care Act (ACA) that you have gotten rid of the fee for not having health coverage, so, in most cases the 1095-B will simply be a statement to keep for your records. Some states, however, will have their own individual health care law and may fine you for not having health coverage. You should check with your local state or tax preparer to find out.

Need a copy of your 1095-B?

Currently the VA mails a copy of the 1095-B tax form out to enrolled Veterans at the beginning of the year between December and March. You may also sign up for paperless delivery of this form and/or download a copy from your records on va.gov. To get a copy of your 1095-B online, visit <https://www.va.gov/records/download-your-irs-1095-b>.

If you have additional questions around the 1095-B and your VA health care coverage or see an error on the form, you can call us at the Health Benefits helpline toll-free at 1-877-222-VETS (1-877-222-8387). Services are available Monday through Friday, 8:00 am until 8:00 pm (EST) to answer your questions and assist in filing any errors on your form.

IRS 1095-B Tax Form (Health Coverage) Frequently Asked Questions

When and how do I get a copy of my 1095-B tax form?
Currently the VA mails a copy of the 1095-B tax form out to enrolled Veterans at the beginning of the year between December and March. You may also sign up for paperless delivery of this form and/or download a copy from your records on va.gov. To get a copy of your 1095-B online, visit <https://www.va.gov/records/download-your-irs-1095-b>.

You will receive the form in the mail package unless you opt for paperless delivery. You can select this option on the va.gov 1095-B download page or by calling the paperless delivery assistance helpline at 1-877-222-VETS (1-877-222-8387).

What do I need to do with the 1095-B?
No action is required to take with the form. The 1095-B is provided to you for your records only, keeping the Health Care Individual Responsibility questions on your tax return. Alternatively, you may file your 1095-B online with your tax preparer or file it electronically with your state.

What if information on my 1095-B is incorrect or my information has changed?
If you make an error on your 1095-B, the number we received this is to update your contact information or your profile on va.gov. Once updated, a new 1095-B should be available for download within a few days.

If other things need to be made on your 1095-B, like your name, social security number, all the health benefits helpline toll-free at 1-877-222-VETS (1-877-222-8387). You may also find additional information regarding the ACA on VA's website at <https://www.va.gov/health-care/about-affordable-care-act/>.

If you need a change to your 1095-B, how long will it take to get a new one?

Changes to your 1095-B are processed and mailed out to you as soon as possible. The entire process may take up to 10 business days for the VA to receive an updated copy of your 1095-B.

Who is supposed to receive a 1095-B?
All Veterans enrolled in health coverage through the VA will receive a copy of their 1095-B tax form. Even if you do not use the VA as your primary health care, you will still receive this form if you are enrolled.

If I received a 1095-B, am I required to use it?
No. If you do not have the filing requirements, you do not have to file the tax return solely because you received the 1095-B tax form. It is merely a statement to comply with the Affordable Care Act, but you do not have to file it.

Do I need to send it to the IRS even when I don't have any?
No. While the IRS does not require you to file a return if you do not have any, it is not required. Veterans should not send it to the IRS and the IRS return as they normally would.

How long do I need to keep my 1095-B tax form?

Product Guide: Call Center Review

IRS 1095-B Tax Form (Health Coverage)

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Cover Letter



<Date Printed>

<VPID>
<First Name> <Middle Name or Middle Initial> <Last Name>, Suffix
<Address 1>
<Address 2>
<Address 3>
<City> <State>, <Zip>

<FIRST NAME> <LAST NAME>

Please keep this letter and the enclosed tax form for your <tax year> tax records.

The Affordable Care Act (ACA) requires the Department of Veterans Affairs (VA) to notify enrolled Veterans of their period of health care coverage during the previous calendar year. The law also requires VA to provide this notification to the Internal Revenue Service (IRS).

Enclosed you will find your IRS 1095-B tax form, which documents your VA health care period of coverage during <tax year>. No additional steps need to be taken with this document. The federal tax penalty for not having health coverage has been removed, but some states still have specific filing requirements. Follow your local state IRS instructions, as applicable, for completing the Health Care Individual Responsibility information on your tax return form.

Download this Form Online

Get a digital copy of your 1095-B at www.va.gov/records/download-your-irs-1095-b. If you would like to save paper, you can also opt-in for digital only delivery for this form.

Get Help and More Information

If you need to change the address on your 1095-B, you can do so by logging into your VA.gov profile and updating your contact information; a new form will be available for download within 4 business days.

If you need additional help or have questions, call us toll-free at 1-877-222-VETS (1-877-222-8387) Monday through Friday, 8:00 am until 8:00 pm (EST). You may also find additional information regarding the ACA on VA's website at <https://www.va.gov/health-care/about-affordable-care-act/>. For more information regarding the ACA's tax implications, visit www.irs.gov/affordable-care-act/individuals-and-families.

Thank you for your service to our Nation.

Sincerely,

Director, Health Eligibility Center
VAH Member Services

710-8804
Apr 2022

<https://mostudio.box.com/s/jaqtzcg1vwbgth1luh9lbzuum33ji18b>

Next Steps

- Send copy and designs to Tarsha for review (if needed)