10-10EZ Household information

Previous research…

Uncertain where to obtain this information.

"Oh geeze. Oh jesus....Now I need to call my tax man...It should say what box to refer to on my tax form or just let me upload it." (In regards to financial disclosure and dependents information)

Concern about how the information would be used and its impact on their qualification for health care.

"Will my financial information impact the health coverage I receive?"

The dependent section causes confusion as to what qualifies as a dependent.

- For those that the dependent is their child, the "When did they become your dependent?" question is confusing.

“What is a dependent defined? My spouse? I also finance my spouse's parents, but they live in the Philippines, do they count or do I have to go by the IRS definition?"

VA | U.S. Department of Veterans Affairs

10-10EZ Household information

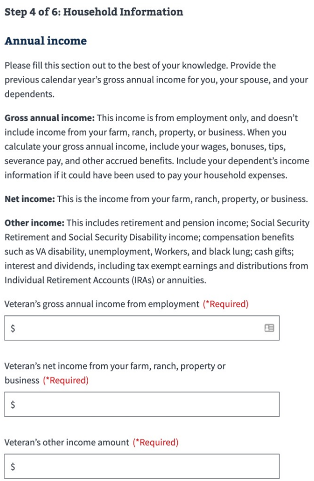
UX design exploration

- General suggestions
- Specific design changes
- Questions to follow up on
- Potential research & discovery

General suggestions

General suggestions

- Separate sections into multiple pages (ex: spousal info, dependent info, etc.)
- Reconsider question order: the section starts with a setup for financial information, but spousal and dependent information comes first?


Step 4 of 6: Household Information

Annual income

Please fill this section out to the best of your knowledge. Provide the previous calendar year's gross annual income for you, your spouse, and your dependents.

Gross annual income: This income is from employment only, and doesn't include income from your farm, ranch, property, or business. When you calculate your gross annual income, include your wages, bonuses, tips, severance pay, and other accrued benefits. Include your dependent's income information if it could have been used to pay your household expenses.

Net income: This is the income from your farm, ranch, property, or business.

Other income: This includes retirement and pension income; Social Security Retirement and Social Security Disability income; compensation benefits such as VA disability, unemployment, Workers, and black lung; cash gifts; interest and dividends, including tax exempt earnings and distributions from Individual Retirement Accounts (IRAs) or annuities.

Veteran's gross annual income from employment (*Required)

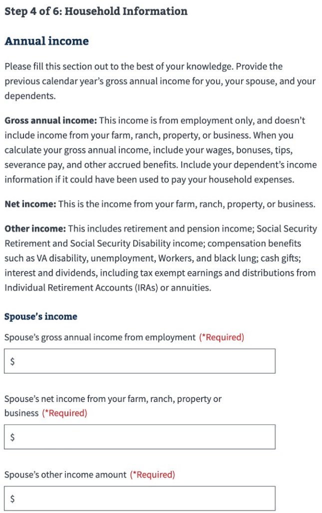
$

Veteran's net income from your farm, ranch, property or business (*Required)

$

Veteran's other income amount (*Required)

$


Step 4 of 6: Household Information

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Spouse's income

Spouse's gross annual income from employment (*Required)

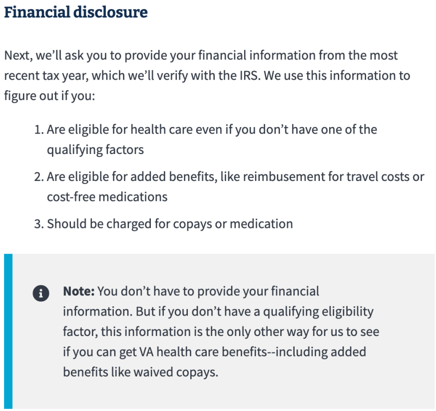
$

Spouse's net income from your farm, ranch, property or business (*Required)

$

Spouse's other income amount (*Required)

$


Financial disclosure

Next, we'll ask you to provide your financial information from the most recent tax year, which we'll verify with the IRS. We use this information to figure out if you:

1. Are eligible for health care even if you don't have one of the qualifying factors
2. Are eligible for added benefits, like reimbursement for travel costs or cost-free medications
3. Should be charged for copays or medication

Note: You don't have to provide your financial information. But if you don't have a qualifying eligibility factor, this information is the only other way for us to see if you can get VA health care benefits--including added benefits like waived copays.

Ex: separate Veteran and spouse info sections, consider redesigning how contextual definitions are presented

VA | U.S. Department of Veterans Affairs

General suggestions

- Use expandable info alerts for contextual information: definitions and instructions
- Consider general contextual info: short sentences explaining what we're asking, and what documentation you will need. Possible on their own pages
- Avoid content overload: keep context short, and use expandable info wherever possible

What counts as a dependent?

Where can I find this information?

What is my gross income?

We will now ask about your spouse's income.
You will need:

- Your spouse's tax return information
- (etc…)

Continue

General suggestions

- Give people confidence that they will be able to easily save and pick up where they left off

Veteran's gross annual income from employment (*Required)

$

Veteran's net income from your farm, ranch, property or business (*Required)

$

Veteran's other income amount (*Required)

$

Save and continue

You can save your progress and come back later.

Your progress is saved!

Your progress is saved

Specific suggestions

Specific design suggestions

- (Dynamic?) sub-stepper

Apply for health care Form 10-10EZ

Step 4 of 6: Household Information

Question 1 of 6

Financial disclosure

Next, we'll ask you to provide your financial information from the most recent tax year, which we'll verify with the IRS. We use this information to figure out if you:

1. Are eligible for health care even if you don't have one of the qualifying factors
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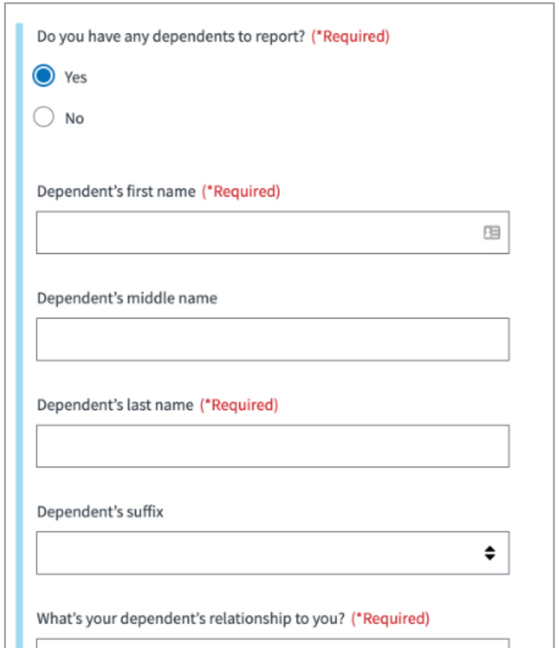
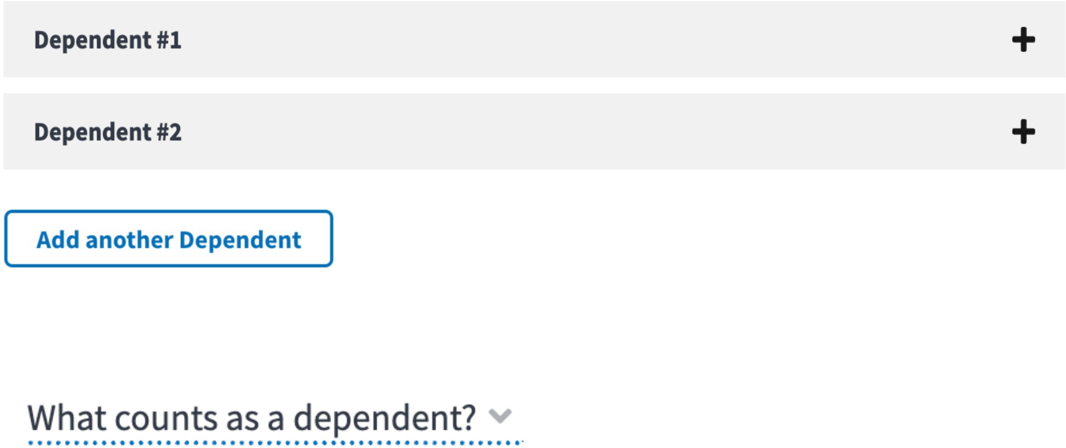
Specific design suggestions

- Multiple dependents makes the page very long - make buckets more distinct, or use expandable sections
- Contextual info: “Who counts as a dependent?”





Specific design suggestions

- Annual income section: distinguish Veteran and spouse information section.
- Expandable info: “Where can I find this info?”
- Contextual info: “We will now ask about your spouse. Here is what you will need…”

Step 4 of 6: Household Information

Annual income

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Step 4 of 6: Household Information

Annual income

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Spouse’s income

Spouse’s gross annual income from employment (*Required)

$

Spouse’s net income from your farm, ranch, property or business (*Required)

$

Spouse’s other income amount (*Required)

$

Where can I find this information?

What is my gross income?

Questions (that I have)

Questions

- How often do we need to explain “Why do we ask this information”?
- What’s our “save and continue” feedback system, if any?
- Are we asking anything that isn’t explicitly required?
- What’s the direction on “required” vs “option” field tags?

Potential research / discovery

Potential research & discovery

- Which definitions do people need to have explained? (ie. “dependents”)
- Where can people find the relevant financial information (ie. what line on what tax form)?
- When is “Why we ask this information” appropriate?