

VA



U.S. Department  
of Veterans Affairs

# Claim Status Tool

**Summary of Claim Status Tool Research, 2021**

Why research the Claim Status Tool?

# Background and goals

- **The Claim status tool is by far the most used pages on VA.gov (27% of all pageviews).** It is not uncommon for veterans to check their claims or appeals multiple times per week (see slide 15).
- A research **report from NCC** (National Call Center) showing that **most calls to the VA call center (74.5%) were about claims or appeals** (see slide 18).
  - Approximately **61% of the calls where about the status of a claim or an appeal specifically**, which is of course the main purpose of the CST.
- The current CST has not been modified or reviewed for over 4 years.

With this research, we wanted to **understand**:

- Why do so many veterans call about claims and appeals?
- What are the most common use cases? What relevant use cases are not served by the current tool?
- What do users expect in the CST, what additional actions would they like to be able to take within the tool?

# Previous Research Review

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# Key Findings 2018-2019

- **Veterans find it critically important to know about any progress of their claim.**
  - Is my claim moving along / in progress, or is something slowing it down?
  - When is my claim getting into the hands of a Veteran Service Representative?
- **The evidence gathering process is time consuming and confusing.**
  - Veterans don't have all the info they need about evidence gathering within VA.
- **When veterans see an alert on VA.gov, they want to look up additional, detailed information.**
  - They want to know e.g.: *“why am I not eligible for the new claim process?”*
- **Participants expressed the desire to confirm file uploads and accuracy.**
  - Participants wanted confirmation that they had sent the correct information to the VA, to view previously uploaded documents and remove documents if uploaded in error.

CST research by Mina F., August, 2021

# Summary

The research: interviews with 10 VSO's across the country about the claim assistance they provide to Veterans.

- 70% of disability claims are submitted with a Veteran representative
- Disability claims assistance makes up 60-90% of a VSOs workload
- More than half of their time, VSO's spend on checking claims in response to a direct request from a Veteran about a claim status.
- 3 personas were identified in the research: The Unaware, The Unable or Unwilling, and The Unsatisfied.
  - For The Unsatisfied veteran:
    - Claim Status Tool does not display content that answers their questions
    - Tool does not tell them what to do if their situation does not match the content
    - "It's been the same status for three months"
    - eBenefits and VA.gov displaying different things
    - There is little context for where you are in the overall process and why you are in that step of the process
    - Decision Information is Inaccessible or Confusing to Veterans. The VSO can see the decision letter in VBMS but the Veteran cannot access the decision letter in any way besides mail

# Quantitative Analysis

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# Summary

## **CST is one of the most used tools on VA.gov.**

- In a period spanning Jan 1 - May 28 (roughly 5 months) 10.375 million pageviews and 5.42 million unique pageviews for the claim or appeals status index page.

## **From the NCC support calls, most of the calls were claim or appeal related (74.5%).**

- Even if the calls are about claims and appeals, we don't know if they necessarily are about the CST itself. We are waiting for a summary of the qualitative data from the call center study.

## **60.7% were asking specifically about the status of a claim or an appeal.**

- Same comment as above. Are the calls about lack of info within, or issues within the CST, or are they simply calling about claims, independent of the tool?

## **There are specific issues with the CST, specifically with regards to Upload documents and check status of a claim.**

- Veterans click on upload and nothing happens, or they see no options to upload documents.
- Veterans are shown in the CST that they don't have a claim, when they do, or that the status of their claim is unknown, or they see a generic message like "gathering evidence" but with no further details.

# Collaborative Design Session & Usability test

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# Findings from 12 veterans

Overall findings:

What participants mentioned most often, were: **a lack of detailed enough information and a lack of updates:**

- **Lack of detailed information about progress** and more details about each step
- **Lack of timelines** and more accurate **time estimations**
- **Lack of relevant and efficient updates**, and adequate, timely communication about the progress

Detailed findings:

1. Participants that had used the tool (8 of 12) found the tool to be easy to use and straightforward, with few issues.
2. They like the steps on the *Detail* page, but find that vital info is missing. In Step 3 (*Evidence gathering, review, and decision*), they want more detailed info on progress and detailed time estimations.
3. They also want to know if there are issues with the claim, and/or actions they need to take, in order for the claim/appeal to proceed.

# Competitive Analysis

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## Summary: comparing VA with 9 other organizations



aetna



wayfair



amazon



Root  
Insurance Co

**What type of information is highly prioritized** (and often visualized)?

- The **current status** of the claim/appeal/order.
  - Showing the **current step** and **remaining steps**.
- An estimated **processing time** and **timeline**.

**What other info** and features are **often provided**?

- Clearly outlined **expectations for the next steps**.
- A section for the full **case history**.
- An option to receive **email and SMS updates**.
- Options to **print & edit info** and **delete uploaded files**.
- **Allow** users to **filter** their **data** effectively.

**How do companies motivate users to finish a claim process?**

- **Pre-populate** as much user **data** as possible.
- **Save** and **show** clearly **any progress** being made.
- **Show** clearly the users **goal proximation**.

**What is provided when there is a long waiting period?**

- Users are provided with **clear, regular updates** when **any relevant change occurs**.
  - **Including push alerts** (through **email** and **SMS** as option).
  - Allow users to **choose frequency of updates**.

# Summary & Next steps

# Summary

## **The research indicates that users desire accurate timelines / time estimates for completion of their claim.**

- Co-design session research indicated that users desired detailed time estimates for overall claim completion. (This was also found in the Competitive analysis.)

## **Users desire more detailed info on status/steps of what is happening with their claim**

- Co-design sessions revealed that a top user feature was to have clear, defined steps as to where their claim was in the process. (This was also found in the Competitive analysis.)
- NCC research indicated that users wanted to view/print all documents related to their claim.
- NCC research indicated that users desired better verification of their actions on VA.gov.
  - E.g. Clearer confirmation that VA received users evidence/documents.

## **The research indicates that users would like more clear information about and access to their decision letters**

- NCC research states that users would like to view/print notification letters.
- Co-design sessions indicate that users highly prioritize the ability to view, download and print decision letters from within the tool.

## **Users desire relevant and efficient updates, and communication about any progress of their claim.**

- Based upon the co-design sessions, users prioritized highly email and text updates for their claim.
  - This was also reflected in the Competitive analysis.

## **There are issues within the CST that needs to be further researched and resolved**

- Users struggle to upload documents and see their claim status, or even see their claim in the tool.

# Recommendations and next steps



# Recommendations for CST

- Conduct a technical discovery/analysis and a business analysis of the current tool.
- Investigate and fix these two current bugs:
  - Users struggle to upload documents/evidence. They click on upload documents and nothing happens
  - The claim status is missing or incorrect.
- Explore design improvements:
  - Improve presentation/visualization of steps/progress state and timeline.
- Explore process and data changes:
  - Add more details about the status of a claim and more details for each step/progress state
  - Provide more detailed updates to users about progress of claim, including time estimates.
- Other changes we can do to reduce number of calls to the call centers:
  - Make sure veterans know about the Claim Status Tool.
  - Allow user to view and download decision letters.

# Next steps

One of the reasons the Claim Status Tool was picked as a tool that could be valuable to update/improve, is that it is the absolute number one topic within [the VA call center](#).

We need to understand what is behind the quant data from the call centers. Problem with tool? Lack of info? Lack of knowledge that the tool exists?

We will do an analysis of the specific content/topics within these calls. With this info and the info coming out of the research presented above, we will come with a set of specific recommendations for upcoming research and design for the Claim Status Tool.

### Further steps / action items

- **Technical discovery / analysis of the current tool**
- **Business process discovery with the current tool**
- **Further quantitative and qualitative analysis of the current tool**
- **Stakeholder interviews and business goal perspectives**

# End

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