

# Veteran Top Tasks Survey

## Research Readout

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**Cindy Merrill**

Senior Researcher 2

[cindy.merrill@adhocteam.us](mailto:cindy.merrill@adhocteam.us)



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# Research Goal & Questions

**Goal:** Learn **which VA-related tasks are most important to Veterans** (*and family members or caregivers, survivors, and service members*)

so these tasks can be best supported from the VA.gov home page

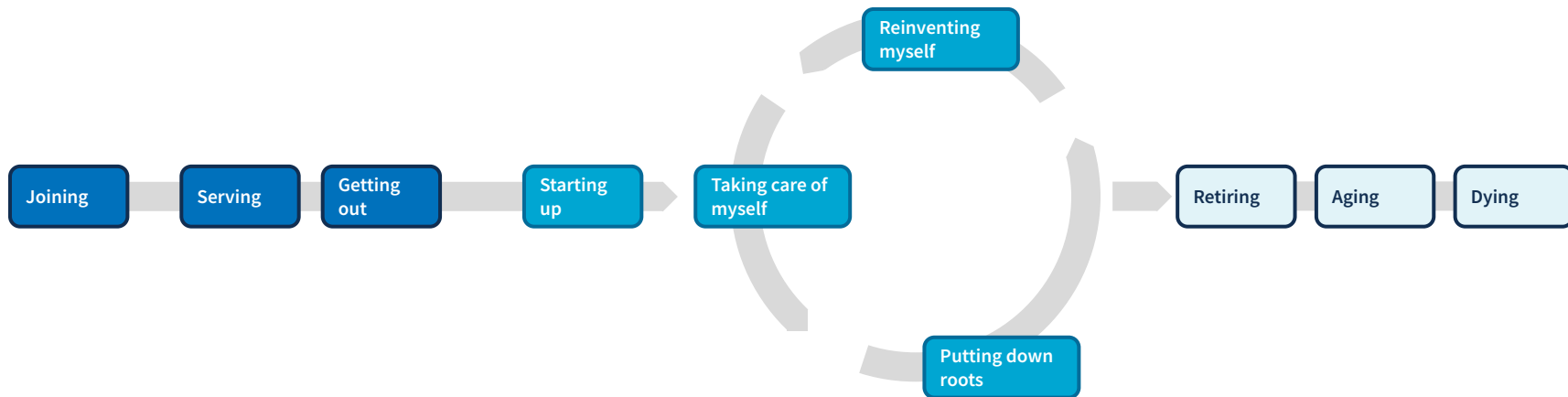
## Research Questions:

1. When Veterans and others contact the VA, what tasks are most important to them?
2. How many tasks do Veterans and others identify as important to themselves?
3. What tasks are least important?
4. Are there any important tasks missing?
5. What tasks are done most frequently?

# How this research maps to the Veteran journey

Veterans and others (caregivers, family members, survivors, and service members) do VA-related tasks throughout

- Serving and separation
- Living civilian life
- Retiring and aging



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

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# OCTO-DE goals that 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

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# Methodology

**Online survey** in Optimal Workshop Questions tool

**Phase 1: Remote moderated** 1-hour sessions over Zoom to get feedback on survey

*Survey questions, tasks, and instructions were refined per [moderated findings](#)*

**Phase 2: Unmoderated survey** in distinct cohorts of fewer than 10 participants per cohort (per PRA)

**Data analyzed:** 48 unmoderated + 7 moderated participants = **55 survey responses**

Please check the VA-related tasks below that are **most important to YOU personally right now**, no matter how you do them (in person, on the phone, or online). You'll need to **scroll down** to see all the options.

- ☐ Learn about or file for disability compensation (service-related)
- ☐ Check the current disability compensation rates
- ☐ Upload evidence to support disability claim
- ☐ Check your claim or appeal status
- ☐ Request a decision review (appeal) on a claim
- ☐ File for a VA disability increase
- ☐ View your disability rating
- ☐ Learn about or apply for education benefits
- ☐ Compare VA education benefits and rates by school
- ☐ Check or update your current education benefits
- ☐ Verify your monthly school enrollment



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# VA-Related Tasks in Survey (41)

Synthesized from colleagues, VA.gov home page, user research studies, and top VA site searches. Reviewed by IA and Content folks.

2.

Please check the VA-related tasks below that are most important to YOU personally right now, no matter how you do them (in person, on the phone, or online). You'll need to scroll down to see all the options.

\*

Checkbox select

- Learn about or file for disability compensation (service-related)
- Check the current disability compensation rates
- Upload evidence to support disability claim
- Check your claim or appeal status
- Request a decision review (appeal) on a claim
- File for a VA disability increase
- View your disability rating
- Learn about or apply for education benefits
- Compare VA education benefits and rates by school
- Check or update your current education benefits
- Verify your monthly school enrollment
- View your payment history
- Pay your VA copay bill or other VA debt
- Get help with your VA debt
- Review or update direct deposit
- Learn about or apply for VA health care
- Update insurance or financial information for your VA health care
- Check your lab or test results
- Message your doctor or get a health care message
- Refill or track a prescription

- Schedule or manage health appointments
- Find a mental health counselor or therapist
- Learn about or order hearing aid batteries
- Get your VA medical records
- Learn about or file for reimbursement for travel expenses to/from medical appointments
- Apply for a home loan Certificate of Eligibility (COE)
- Get help with your rent, utility bills, or other housing-related expenses
- Update your contact information with VA
- Review or update your dependents
- Learn about or apply for a Veteran ID card
- Get letters about your VA benefits and service history (benefit letters)
- Request your military records (DD214)
- Find a hospital, clinic, pharmacy, or Vet Center
- Find a VA form
- Apply to receive benefits as a Veteran's caregiver
- Find VA events and classes
- Get help with your VA claim/application from a Veterans Service Officer (VSO) or an accredited representative
- Learn about job and training support available from VA
- Learn about or apply for monthly Veterans pension payments
- Learn about or apply for life insurance
- Learn in advance if eligible for burial in a VA cemetery
- None of the above are important to me

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# Other Survey Questions

• 1.

How do you typically interact with the VA? Check all that apply.

\*

Checkbox select

- ☐ Visit a VA location
- ☐ Call the VA
- ☐ Use VA.gov
- ☐ Use My HealtheVet
- ☐ Use eBenefits
- ☐ I don't contact the VA directly, but I hear about it while helping someone else
- ☐ I don't interact with the VA
- ☐ Other \_\_\_\_\_

• 3.

Are there any VA-related tasks that are important to you that you DIDN'T see in the previous list?

Multi-line text

• 4.

What VA-related tasks do you do MOST FREQUENTLY?

Multi-line text

• 5.

What VA benefits (if any) do you have experience with? Check all that apply.

\*

Checkbox select

- ☐ Health care (for example, clinic appointments, prescription refills, or messaging)
- ☐ Education (for example, GI Bill or Yellow Ribbon)
- ☐ Career services (for example, Vocational Rehabilitation & Employment or small business certification)
- ☐ Disability (for example, claims and appeals)
- ☐ Housing (for example, adaptive housing or homelessness services)
- ☐ Home loan Certificate of Eligibility (COE)
- ☐ Pension
- ☐ Life insurance
- ☐ Burial benefits or memorial items
- ☐ None of the above
- ☐ Other \_\_\_\_\_

• 6.

What is your role in relation to the VA? Check all that apply.

\*

Checkbox select

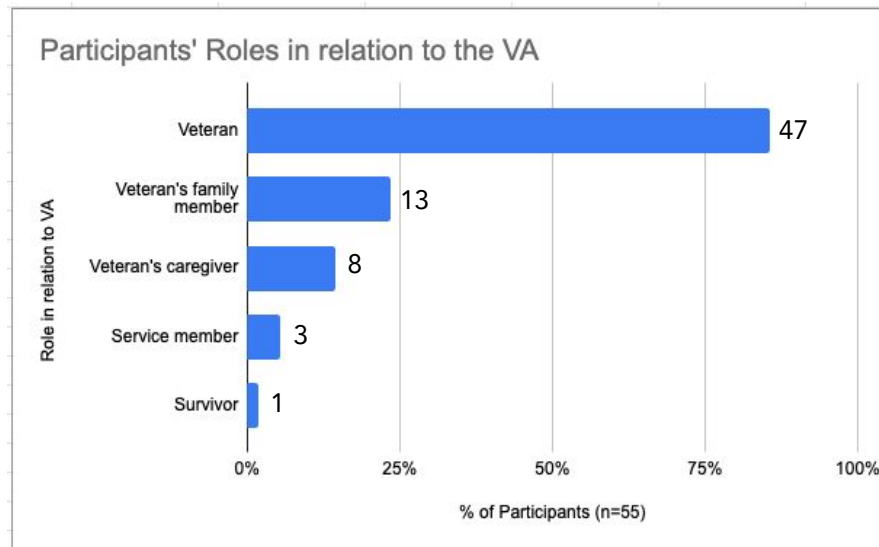
- ☐ Veteran
- ☐ Veteran's family member
- ☐ Veteran's caregiver
- ☐ Service member
- ☐ Survivor
- ☐ Other \_\_\_\_\_

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# Participant Demographics



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

- Mobile users
- Identify as gay, lesbian, bisexual, transgender, or non-binary
- Other than honorable discharge
- Immigrant origin
- Live abroad
- Use assistive technology

## Veteran Top Tasks Unmoderated

final # of participants		55	# of AT users		0							
Category	%	Target	Study	1	2	3	4	5	6	7	8	9
Veterans		Based on current VA statistics										
<a href="#">Age 55-64+</a>	50.00%	28	23	0	0	0	0	0	0	0	0	0
<a href="#">Cognitive Disability</a>	50.00%	28	10	0	0	0	0	0	0	0	0	0
<a href="#">Mobile user</a>	50.00%	28	unknown	0	0	0	0	0	0	0	0	0
<a href="#">Rural</a>	25.00%	14	20	0	0	0	0	0	0	0	0	0
<a href="#">No degree</a>	25.00%	14	10	0	0	0	0	0	0	0	0	0
<a href="#">Other than honorable</a>	21.00%	12	unknown	0	0	0	0	0	0	0	0	0
<a href="#">Immigrant origin</a>	17.00%	10	unknown	0	0	0	0	0	0	0	0	0
<a href="#">Women</a>	10.00%	6	26	0	0	0	0	0	0	0	0	0
<a href="#">Expat (living abroad)</a>	0.40%	1	unknown	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
Hispanic	12.00%	7	7	0	0	0	0	0	0	0	0	0
Biracial	3.90%	3	1	0	0	0	0	0	0	0	0	0
Asian	3.00%	2	1	0	0	0	0	0	0	0	0	0
Native	0.30%	1	2	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	unknown	0	0	0	0	0	0	0	0	0
Transgender	--%	1	unknown	0	0	0	0	0	0	0	0	0
Nonbinary, gender fluid, ge	--%	1	unknown	0	0	0	0	0	0	0	0	0

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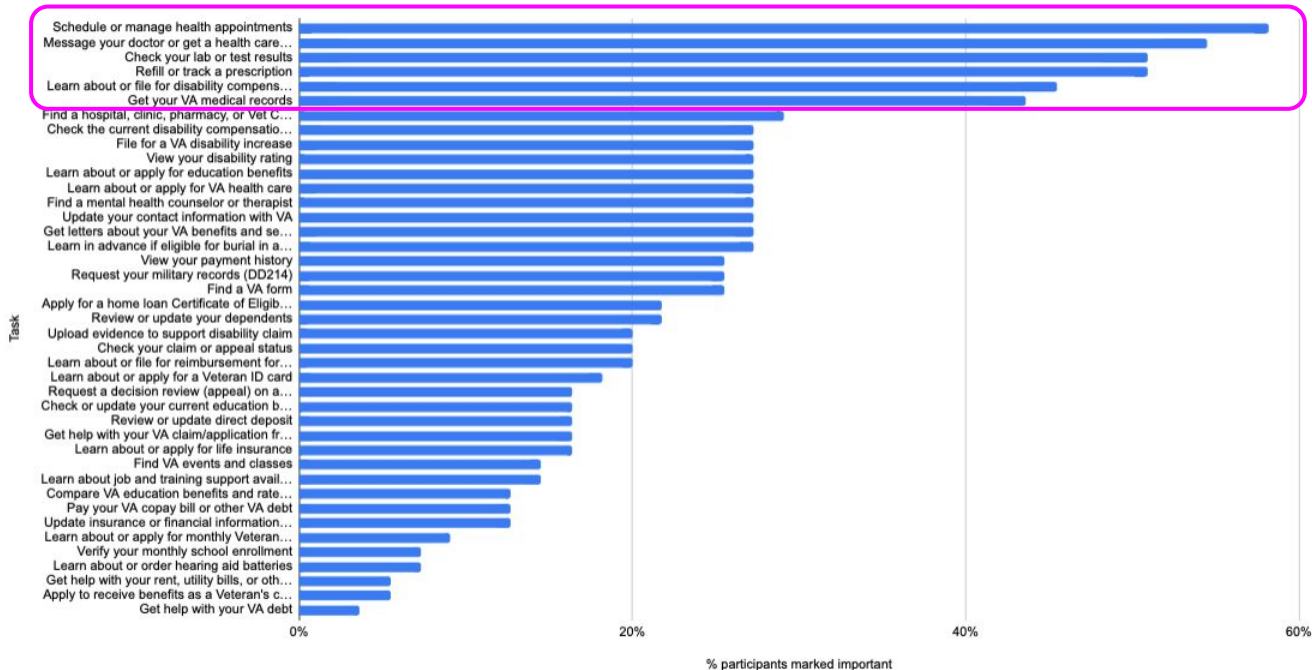
# Key Finding #1: Most top tasks were related to health care

Across all survey participants, **5 of the 6 top tasks were related to health care** (only *Learn about or file for disability compensation* was not):

Task	% participants marked important	# participants (of all 55) marked important
Schedule or manage health appointments	58%	32
Message your doctor or get a health care message	55%	30
Check your lab or test results	51%	28
Refill or track a prescription	51%	28
Learn about or file for disability compensation (service-related)	46%	25
Get your VA medical records	44%	24

# Top Tasks Histograms

% participants who marked each task as important (all 55 participants)



Top Tasks research results are usually shown in a **histogram** to visually compare tallies per task.

But task names are too small to read in slides, so no more here.

See them in the [full research report](#).



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## Key Finding #2: For participants w/o VA health care, top tasks were quite different

For participants who don't use VA health care, top tasks were quite different.

**Only overlaps:**

*Learn about or file for disability compensation*

**and**

*Get your VA medical records*

Task	% participants marked important	# participants (of 14 w/o VA health care) marked important
Learn about or file for disability compensation (service-related)	71%	10
Learn about or apply for education benefits	50%	7
Apply for a home loan Certificate of Eligibility (COE)	50%	7
Update your contact information with VA	43%	6
Review or update your dependents	36%	5
Get your VA medical records	36%	5
Get letters about your VA benefits and service history (benefit letters)	36%	5
Check the current disability compensation rates	36%	5
Check or update your current education benefits	36%	5

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## Key Finding #3: Top tasks varied by participant age

Task	% participants marked important	# participants (of 23 who are 55 or older) marked important
Schedule or manage health appointments	65%	15
Check your lab or test results	61%	14
Message your doctor or get a health care message	61%	14
Refill or track a prescription	57%	13
Learn in advance if eligible for burial in a VA cemetery	52%	12
Find a VA form	48%	11
Get your VA medical records	48%	11
Find a hospital, clinic, pharmacy, or Vet Center	44%	10

Task	% participants marked important	# participants (of 7 who are under 35) marked important
Learn about or apply for education benefits	71%	5
View your payment history	71%	5
Check or update your current education benefits	57%	4
Compare VA education benefits and rates by school	57%	4
Get your VA medical records	57%	4
Update your contact information with VA	57%	4
Apply for a home loan Certificate of Eligibility (COE)	43%	3
File for a VA disability increase	43%	3
Find a mental health counselor or therapist	43%	3
Learn about or file for disability compensation (service-related)	43%	3
Verify your monthly school enrollment	43%	3

Top tasks varied by participant age, with **older participants favoring health care and burial tasks**, while **younger participants focused on education benefits and payment history**.

Participants age 35-54 align more with the older group--mostly health care tasks plus disability compensation, but no burial.

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# Key Finding #4: List of 25 top tasks from all segments

## 25 Top Tasks of 41 tested

### 6 Primary Top Tasks

### 9 Secondary Top Tasks

### 10 Tertiary Top Tasks

Task with at least 30% importance in any segment		Top task in how many segments? (out of 6: all, hc, no hc, < 35, 35-54 >55)
Learn about or file for disability compensation (service-related)		6
Get your VA medical records		6
Schedule or manage health appointments		4
Message your doctor or get a health care message		4
Check your lab or test results		4
Refill or track a prescription		4
Update your contact information with VA		3
Find a hospital, clinic, pharmacy, or Vet Center		2
Find a mental health counselor or therapist		2
File for a VA disability increase		2
Learn about or apply for education benefits		2
Get letters about your VA benefits and service history (benefit letters)		2
Learn in advance if eligible for burial in a VA cemetery		2
Apply for a home loan Certificate of Eligibility (COE)		2
Check or update your current education benefits		2
Check the current disability compensation rates		1
Learn about or apply for VA health care		1
Find a VA form		1
View your payment history		1
Request your military records (DD214)		1
Review or update your dependents		1
Learn about or file for reimbursement for travel expenses to/from medical appointments		1
Learn about or apply for life insurance		1
Compare VA education benefits and rates by school		1
Verify your monthly school enrollment		1



# Key Finding #4 (cont'd): 25 top tasks by benefit category

## 25 Top Tasks by Benefit Category, sorted

### 9 Health Care tasks

### 4 Education tasks

### 3 Disability tasks

### 3 Other

### 6 Independent of benefit categories

Task with at least 30% importance in any segment		Benefit category
Get your VA medical records		health care
Schedule or manage health appointments		health care
Message your doctor or get a health care message		health care
Check your lab or test results		health care
Refill or track a prescription		health care
Find a hospital, clinic, pharmacy, or Vet Center		health care
Find a mental health counselor or therapist		health care
Learn about or apply for VA health care		health care
Learn about or file for reimbursement for travel expenses to/from medical appointments		health care
Learn about or apply for education benefits		education
Check or update your current education benefits		education
Compare VA education benefits and rates by school		education
Verify your monthly school enrollment		education
Learn about or file for disability compensation (service-related)		disability
File for a VA disability increase		disability
Check the current disability compensation rates		disability
Learn in advance if eligible for burial in a VA cemetery		burial
Apply for a home loan Certificate of Eligibility (COE)		housing
Learn about or apply for life insurance		life insurance
Update your contact information with VA		
Get letters about your VA benefits and service history (benefit letters)		
Find a VA form		
View your payment history		
Request your military records (DD214)		
Review or update your dependents		

# Key Finding #4 (cont'd): 25 top tasks by Learn vs. Manage

## 25 Top Tasks by Learn vs. Manage Benefit

### 13 Manage benefit tasks

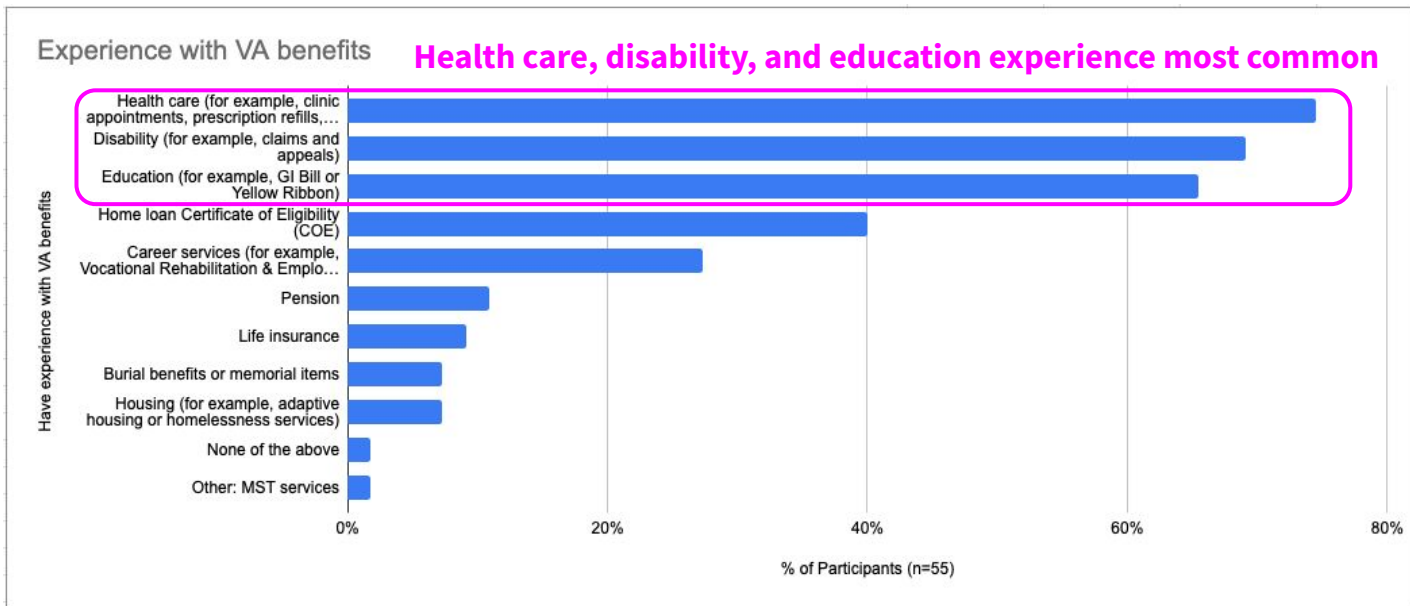
### 6 Learn/Explore/Apply benefit tasks

### 6 Learn OR Manage benefit tasks

Task with at least 30% importance in any segment	% participants marked important overall
Schedule or manage health appointments	58%
Message your doctor or get a health care message	55%
Check your lab or test results	51%
Refill or track a prescription	51%
Get your VA medical records	44%
Update your contact information with VA	27%
Get letters about your VA benefits and service history (benefit letters)	27%
File for a VA disability increase	27%
View your payment history	26%
Review or update your dependents	22%
Learn about or file for reimbursement for travel expenses to/from medical appointments	20%
Check or update your current education benefits	16%
Verify your monthly school enrollment	7%
Learn about or file for disability compensation (service-related)	46%
Learn in advance if eligible for burial in a VA cemetery	27%
Learn about or apply for VA health care	27%
Learn about or apply for education benefits	27%
Apply for a home loan Certificate of Eligibility (COE)	22%
Learn about or apply for life insurance	16%
Find a hospital, clinic, pharmacy, or Vet Center	29%
Find a mental health counselor or therapist	27%
Check the current disability compensation rates	27%
Find a VA form	26%
Request your military records (DD214)	26%
Compare VA education benefits and rates by school	13%

# Key Finding #5: Hard to recruit people who don't use VA benefits

We wanted **people who had experience with a variety of VA benefits and services** so that each of our tasks would be potentially relevant to at least some respondents



It was **challenging to recruit people who don't use VA benefits because such people generally aren't interested in providing feedback to VA.**

We wanted 20% of such participants but instead got only 2% (1 participant of 55).

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## Other Key Findings

6. The **most frequently done tasks were all related to health care** and aligned closely with the overall top tasks. (The survey asked this in an open-text field, not by providing a list of tasks from which to choose.)

7. Here are the **least important tasks overall**:

- *Verify your monthly school enrollment*
- *Learn about or order hearing aid batteries*
- *Get help with your rent, utility bills, or other housing-related expenses*
- *Apply to receive benefits as a Veteran's caregiver*
- *Get help with your VA debt*

8. **Participants selected an average of 9.5 tasks as important** (ranging from 1 to 26). This was interesting because we didn't include the "select up to 10" wording that was originally in the survey question.

# Recommendation #1: Choose tasks based on audience

When choosing user tasks for use in designing the VA.gov home page or planning any user research or analytics,

**consider your intended audience:**

- Will there will be people who **use VA health care**?
  - People who *don't* use VA health care?
  - Both?
- What **age range(s)**?
  - Younger?
  - Older?
  - All ages?
- Where will they be in their **journey using VA benefits**?
  - Focused on learning about VA benefits and applying for them?
  - Managing the benefits they already have?
  - Both?

*Then select a range of tasks from the list of the top 25 which have at least some relevance to most people in your user base*

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## Recommendation #2: VA.gov should support all 25 tasks

Since the unauthenticated VA.gov home page serves users of **ALL ages and benefit experience levels with VA (including with and without VA health care)**,

**we'd like the VA.gov home page to support ALL 25 top tasks.**

Usability testing of the redesigned home page will provide valuable input to see whether all top tasks are easy to do from the home page.

*Usability testing was conducted this month, and data synthesis and reporting are happening soon, so stay tuned...*

## Recommendation #3: Group together health care tasks

Since the **top health care tasks** are so important to anyone using VA health care and irrelevant to **those who are not**, consider grouping them together into one navigation item (i.e., "manage your health care") instead of listing them separately:

- *Schedule or manage health appointments*
- *Message your doctor or get a health care message*
- *Check your lab or test results*
- *Refill or track a prescription*

But consider **having** *Get your VA medical records* **separate** because it's also a top task for people without VA health care

# Next Steps

- Present results to Sitewide Public Websites, Health Apartment, Authenticated Experience, and any other interested teams.
- **Evaluate the performance of the top tasks from this research from usability testing of the home page redesign** *[IN PROCESS]*
  - For tasks that prove difficult to do during usability testing, consider design changes to the redesigned home page to make them easier, and then do another round of testing.

# Questions?

Link to [full research report on GitHub](#)

Reach out to Cindy Merrill or Michelle Middaugh on Slack