Find a Form PDF Downloading

Research Readout

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Agenda

- Background and Research Goals
- Methodology
- Participants
- Key Findings
- Recommendations

Background

Veterans can access many VA forms from **Find a VA form** tool

- Some forms: fill out online
- Others: download a fillable PDF form

Known issue: **Download link** may download the form, or **open the form in the user's web browser**, *where it CANNOT be filled out and digitally signed*
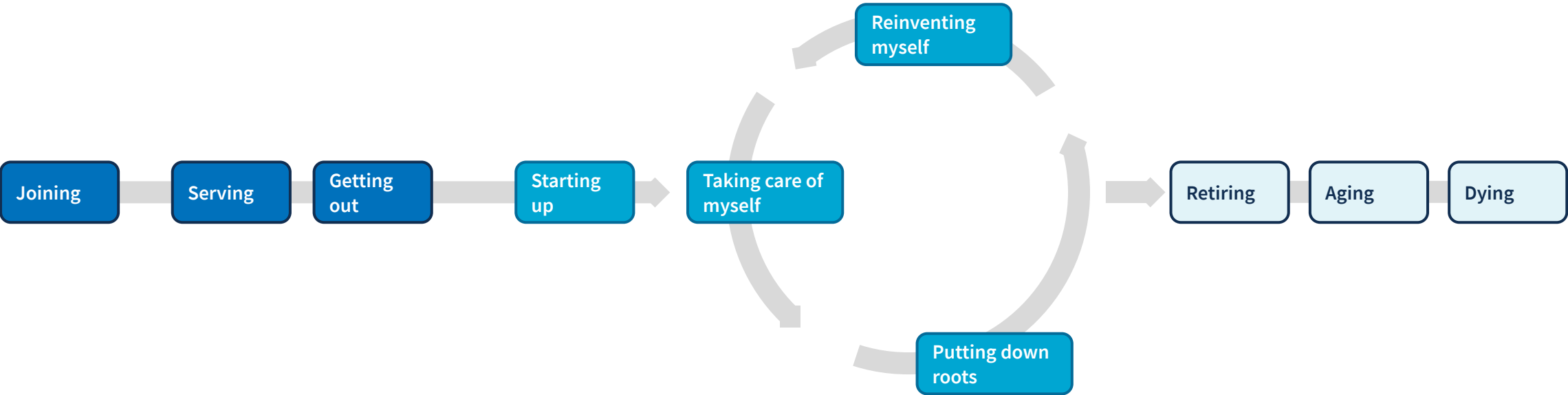
How this research maps to the Veteran journey

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Apply for and update Veteran benefits throughout
- Living civilian life
- Retiring and aging

when referred to a form by a VSO, attorney, friend, social media, VA call center, or VA website

Reinventing myself

Joining → Serving → Getting out → Starting up → Taking care of myself → Retiring → Aging → Dying

Putting down roots

For a fully detailed Veteran journey, go to
https://github.com/department-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

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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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Research Goals

1. **Understand how Veterans download fillable PDF VA forms** and what challenges they encounter

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2. **Get feedback on 3 designs** for advising users to download a PDF form and then open it with Acrobat, rather than viewing it in a web browser

GitHub Research Folder: plan, convo guide, and notes

Research Goals

1. **Understand how Veterans download VA PDF forms** and what challenges they encounter

2. **Get feedback on 3 designs** for advising users to download a PDF form and then open it with Acrobat, instead of viewing it in a web browser:

   a. **Instructions at top of search results**

   b. **Instructions repeated above every download link in a light blue box**

   c. **Instructions repeated above every download link in gray help text**

More on the Designs

We recommend that you download PDF forms and open them in Adobe Acrobat Reader

Get instructions for opening the form in Acrobat Reader

You'll need to download this form and open it in Adobe Acrobat Reader. Read More

Get instructions for opening the form in Acrobat Reader and Read More links opened a **Resources & Support page with more details**

How to download and open a VA.gov PDF form

We encourage you to download PDFs to your computer or other device instead of opening them in your browser. This is because some browsers have trouble opening PDFs. And sometimes browsers open a PDF but important form fields are missing. Follow these steps to download and open a VA.gov PDF form in Adobe Acrobat Reader instead. You'll need to have the latest version of Adobe Acrobat Reader installed.

Get Acrobat Reader for free from Adobe

1. Click the **Download VA form** link for the form you want to fill out. The PDF will download to your Downloads folder. You can save it to a different folder if you'd like.

   Note: If the PDF form opens in your browser automatically or if you get a "Please wait" error message, you'll need to take one more step to download the PDF: Click on the download icon in your browser. Save the PDF to your device.

2. Open Adobe Acrobat Reader.

3. From the File menu, choose **Open**.

4. Go to your Downloads folder or the location on your device where you saved the PDF. Select the PDF and your form will open. Now you can fill out the form.

Methodology

Remote moderated 1-hour sessions over Zoom

- Participants asked to **search for 4 forms** using Find a Form page on Staging:

  1. 10-2850c (has digital signature)

  2. 10-0003k (has digital signature)

  3. 20-0968 (hosted on vba.va.gov)

  4. 20-0995 (hosted on vba.va.gov)

- **Each participant saw 1 of the 3 versions** of the Find a Form search results page
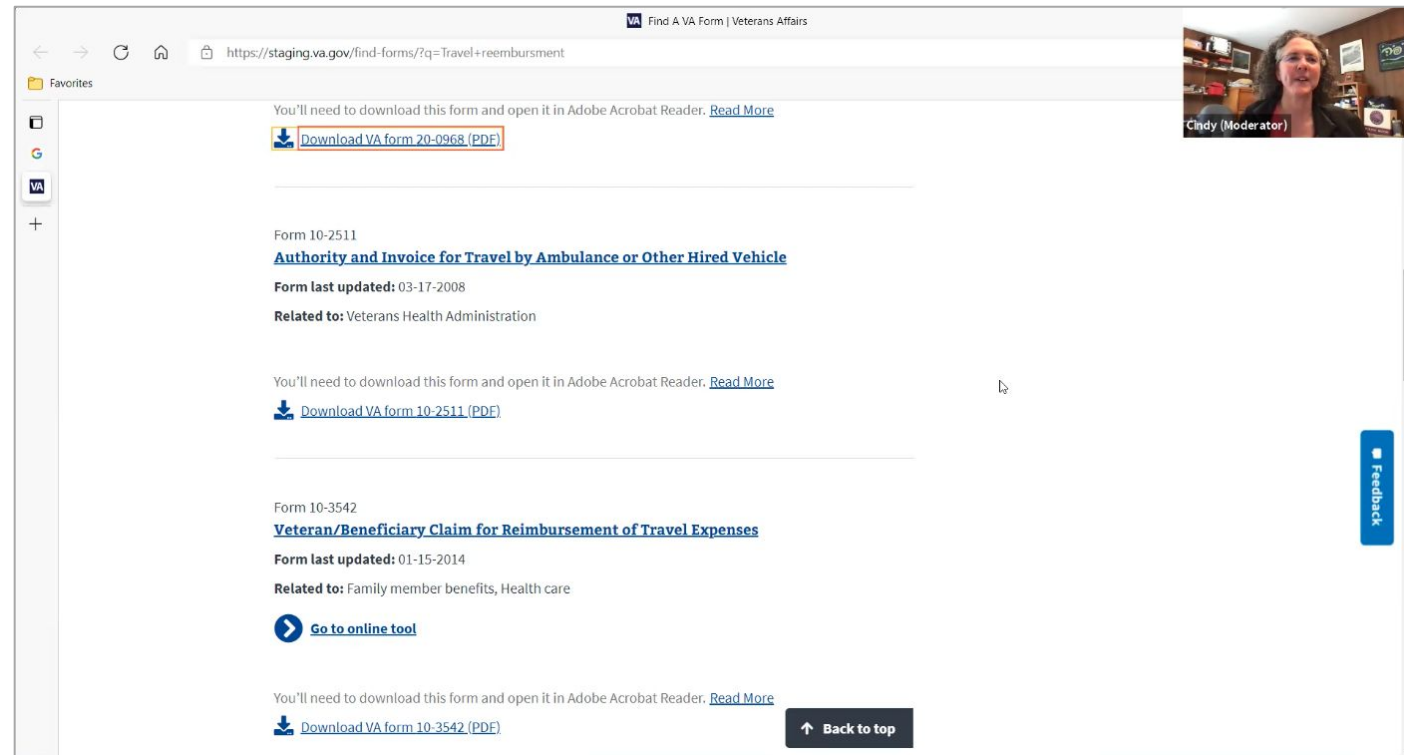
Participants and their Technology

11 participants

- 10 Veterans, 1 family member
- **3 male, 8 female**
- **3** participants with a **cognitive disability**
- **4 screen reader users**

- Age:
  - 25-34: 1
  - 35-44: 2
  - 45-54: 1
  - **55-64: 6**
  - 65-74: 1

Devices:

- **9 desktop** (7 Windows, 2 Mac)
- **3 mobile** (2 iPad, 1 iPhone)

Web browsers used during sessions:

- 5 Chrome
- 5 Safari
- 3 Edge
- 1 Firefox

Some participants used more than one device or browser

Participant Demographics

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

- Identify as Hispanic, Asian, or LGBTQ+
- Other than honorable discharge
- Immigrant origin
- Expat (living abroad)
- Users of Assistive Technology other than screen readers

We recommend studies with these underserved groups in the future.

Find a Form PDF Downloading

# of participants		11		# of AT users	4			# of no shows	2	

Category	%	Target	Study	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Veterans			Based on current VA statistics																
Age 55-64+	50.00%	6	6																
Cognitive Disability	50.00%	6	3																
Mobile user	50.00%	6	3																
Rural	25.00%	3	2																
No degree	25.00%	3	1																
Other than honorable	21.00%	3	unknown																
Immigrant origin	17.00%	2	unknown																
Women	10.00%	2	8																
Expat (living abroad)	0.40%	1	0																
Race			Based on VA's projected statistics																
Black	15.00%	2	2																
Hispanic	12.00%	2	0																
Biracial	3.90%	1	1																
Asian	3.00%	1	0																
Native	0.30%	1	1																
LGBTQ+			LGBTQ+ Veterans are 5 times as likely to have PTSD																
Gay, lesbian, or bisexual	--%	1	unknown																
Transgender	--%	1	unknown																
Nonbinary, gender fluid, ge	--%	1	unknown																
Assistive Tech (AT)			Ask an a11y specialist to help you complete this. Targets are for a general AT study.																
Beginner AT User	50.00%	2	0																
Experienced AT User	50.00%	2	4																
Desktop Screen Reader (SF	20.00%	1	3																
Mobile Screen Reader (SR)	20.00%	1	1																

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CAVEAT:

Findings haven't been shared yet with
VA form owners,
so **please don't forward** to them

Key Findings Summary

1. Most participants **ignored the instructions** provided

2. For most participants, ***Download VA form* link opened forms in web browser** instead of Adobe Acrobat

3. Most participants were **unable to fill out and digitally sign *any* of the forms** without help

   a. **Impossible on mobile devices** because the forms require a version of Adobe Acrobat only available on desktop

4. **Digital signature field was invisible** to screen reader users

5. **Form fields were difficult to fill out** using a screen reader

6. **Find a Form search results were hard to scan** with a screen reader

Accessibility-Related

Key Finding #1

Most participants (9 of 11) completely ignored the instructions--no matter which of the 3 designs they saw on the Find a Form search results page

- Many participants (8 of 11) opened form detail page, and there weren't any instructions there
- Only 2 ever mentioned the instructions
- Only 1 clicked on link to learn more w/o prompting

So, most participants doing tasks w/o the benefit of the instructions we were testing

Key Finding #2

For 9 of 11 participants, the *Download VA form* link opened forms in a web browser instead of Adobe Acrobat

- Can't fill out, digitally sign, or save the form
- Need to manually download the file and open it in Acrobat

- Forms auto-downloaded for 1 participant for all 4 forms (Edge on Windows)
- 2 of 4 forms auto-downloaded for 1 participant (Chrome on Windows)
  - The other 2 forms didn't download, no error message--nothing happened
  - Then tried in Firefox but saw "Please wait" error instead of form

Form 10-252

Authorization to Release Protected Health Information to State/Local Public Health Authorities

Form last updated: 11-26-2020

Related to: Health care, Records

⬇ Download VA form 10-252 (PDF)

Please wait...

If this message is not eventually replaced by the proper contents of the document, your PDF viewer may not be able to display this type of document.

You can upgrade to the latest version of Adobe Reader for Windows®, Mac, or Linux® by visiting http://www.adobe.com/go/reader_download.

For more assistance with Adobe Reader visit http://www.adobe.com/go/acrreader.

Windows is either a registered trademark or a trademark of Microsoft Corporation in the United States and/or other countries. Mac is a trademark of Apple Inc., registered in the United States and other countries. Linux is the registered trademark of Linus Torvalds in the U.S. and other countries.

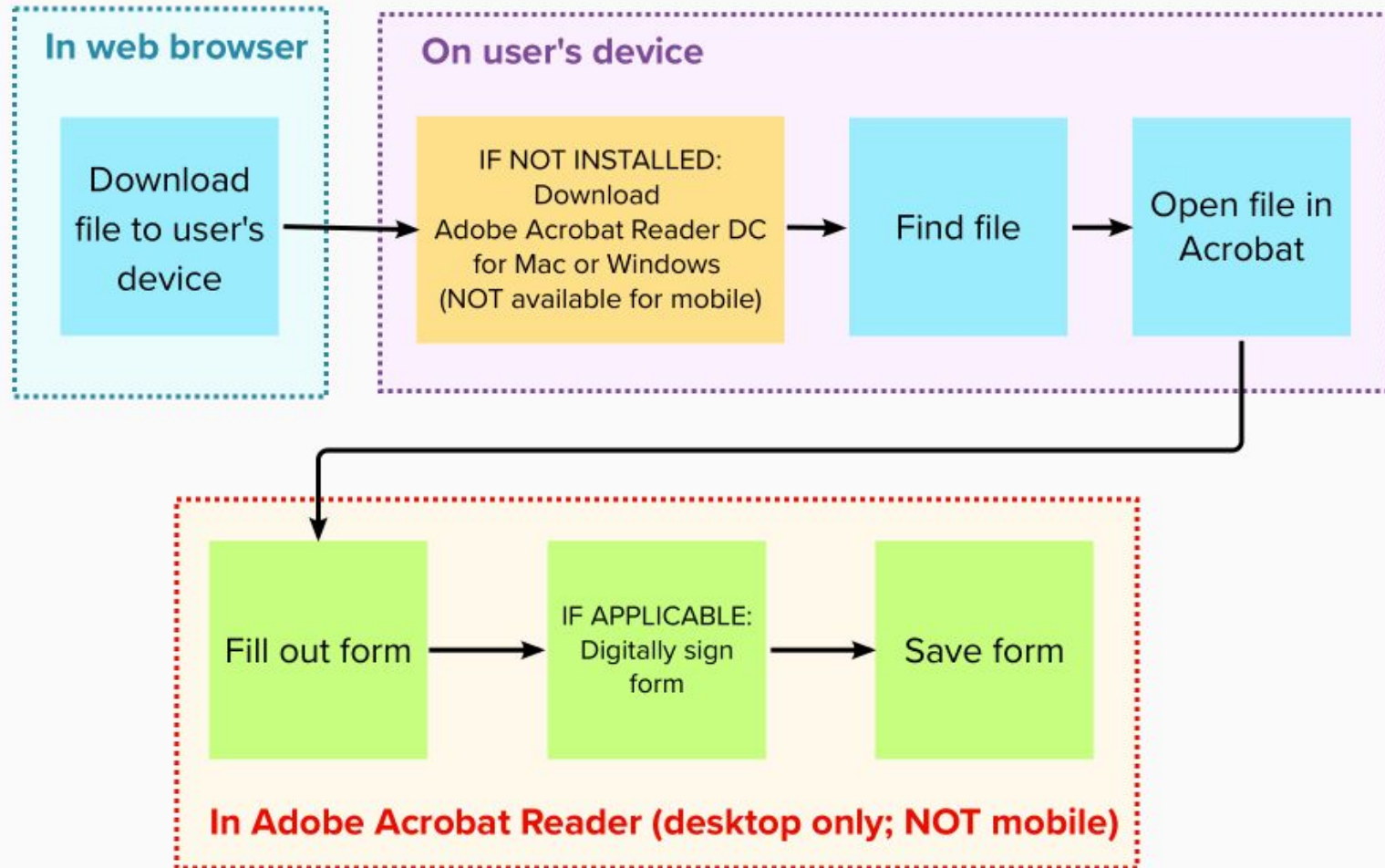Many participants saw the above error message instead of form 10-0003k or 20-0968 and misinterpreted it

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Key Finding #3

Most participants (9 of 11) were unable to fill out and digitally sign ANY of the 4 forms without a lot of help from the moderator, and many participants were unable to succeed even with all the help provided

Issues encountered depended on
- device (must be desktop)
- operating system (Mac/Windows)
- web browser
- whether Adobe Acrobat was installed
- default application to open PDFs

Steps to fill out a PDF Form

In web browser

Download file to user's device

On user's device

IF NOT INSTALLED: Download Adobe Acrobat Reader DC for Mac or Windows (NOT available for mobile)

Find file

Open file in Acrobat

Fill out form

IF APPLICABLE: Digitally sign form

Save form

In Adobe Acrobat Reader (desktop only; NOT mobile)

Key Finding #3 (cont'd)

Downloading the PDF form to the user's device was the most problematic of all of the steps

Steps to fill out a PDF Form with # of issues (yellow) & # of participants affected (gray) per step
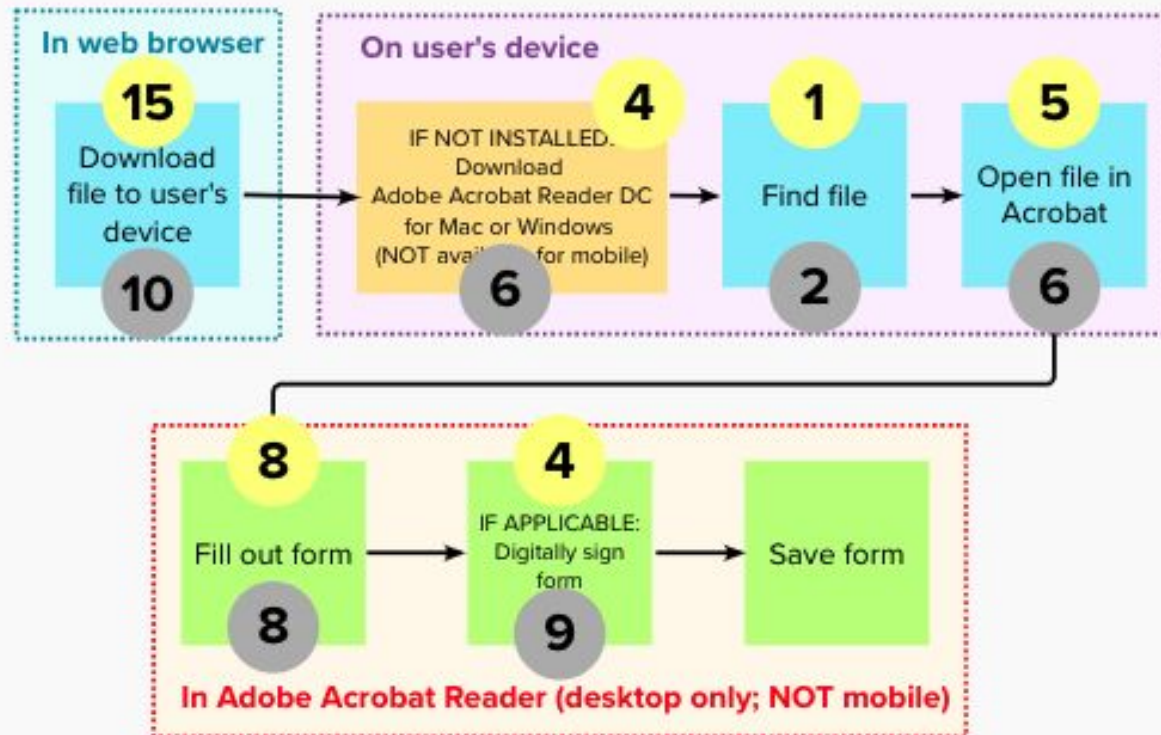
Steps that affected the greatest number of research participants:

1. **Download file to device**
2. **Digitally sign** in Acrobat
3. **Fill out form** in Acrobat
4. Open file in Acrobat
5. Download Acrobat to device

Issues with **Download File** step

Only 4 of 11 participants knew to download the PDF file and open it in Adobe Acrobat Reader. The other participants didn't understand this (didn't read instructions provided) and got stuck, so moderator explained

8 of 11 participants had difficulty downloading the file from the web browser. Issues encountered:
- Many didn't know there was a *download* button in the browser
- In **Firefox** on Windows, tried *Save Page As* → Form not fillable in Acrobat
- In **Safari** on a Mac, tried saving file → Opens a non-editable version in Preview application
- In **Chrome** on Windows, participant started filling out form, clicked *download* button, selected *with your changes* → Info entered not saved
  - Right-clicked on *Download VA form* link, selected *save link* → Not fillable in Acrobat
  - **Had to use the download button in the browser before filling out anything in the form**
- In **Edge** on Windows, tried *Save* button → Not fillable in Acrobat. Same results with *Print > Save as PDF* and *Download > Show in folder >* right-click to open with Acrobat
  - Right-click to open with Edge → Fillable PDF but without digital signature
  - Right-click on the *Download VA form* link → Not fillable
  - Right-click on *Download VA form* link and choose *Save link as* → Fillable but missing visual indicators (shading) for the fillable fields so difficult to figure out where to type

Issues with **Digitally Sign** step

5 of 11 people were unable to digitally sign the two PDF forms that required it.

Here's what they did instead:

- 3 participants used the *Draw* tool in Edge to sign their name
- 1 participant saw a big "X" in the signature box and said they would print the form and sign below the "X"
- When one participant saw the digital signature field prompt open up in Acrobat, they dismissed it and then clicked the *Fill & Sign* button at the top to add her drawn signature

Issues with **Fill out the Form** step

One participant on a Mac was able to fill out the forms in Safari and Preview, but the fillable fields weren't shaded until they moused over them, so difficult to know what to fill out

→ Resolved when forms were opened in Adobe Acrobat

Accessibility issues with the PDF forms encountered by the 4 screen reader users will be detailed later...

Issues with **Open File in Acrobat** step

Mobile device users are unable to open fillable PDF forms because they require a desktop-only version of Adobe Acrobat Reader

➜ Adobe Reader mobile app opens files in read-only mode if able to open at all
➜ One participant tapped on the pencil icon to try to fill out the form
→ error about it being a Protected document

2 participants clicked the downloaded files shown at the bottom of their browser
→ files opened in the browser (instead of Acrobat)

2 participants downloaded forms from Chrome → files opened in Edge (default application in Windows to open PDF files)

When 2 participants opened files in Acrobat, they were prompted to set Acrobat Reader as their default for PDF files
→ Both appeared to not read the prompt and declined
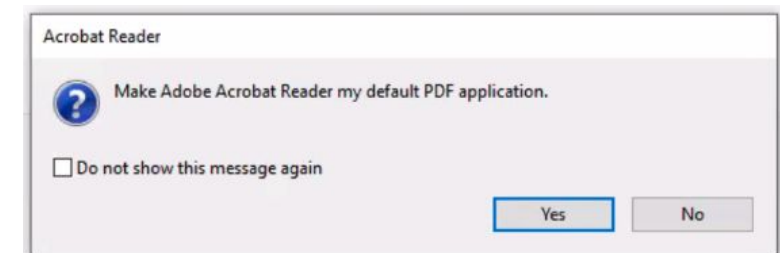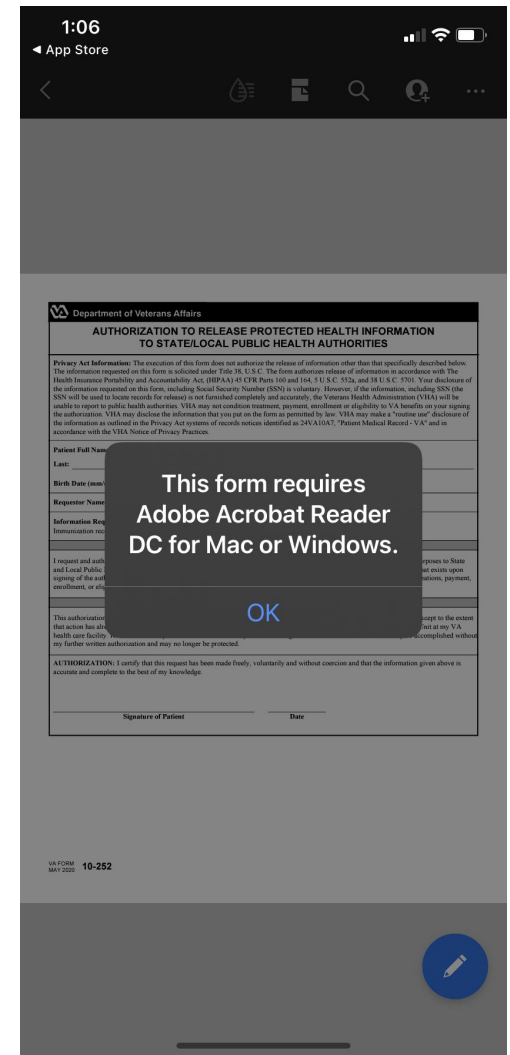
Issues with **Download Adobe Acrobat** step

Mobile: The 3 participants on iOS mobile devices couldn't find Adobe Acrobat but only "Adobe Acrobat Reader PDF Maker" (wrong app)

Desktop (Windows): A participant's download and installation took a long time (~6 min) because McAfee Security Scan Plus and McAfee Safe Connect are also installed by default (unless you un-check the option at the beginning of the install)

Desktop (Mac - Big Sur): The installation's progress bar looked stuck, so participant force quit the install and then started it again; looked stuck again but finally finished after 15 min
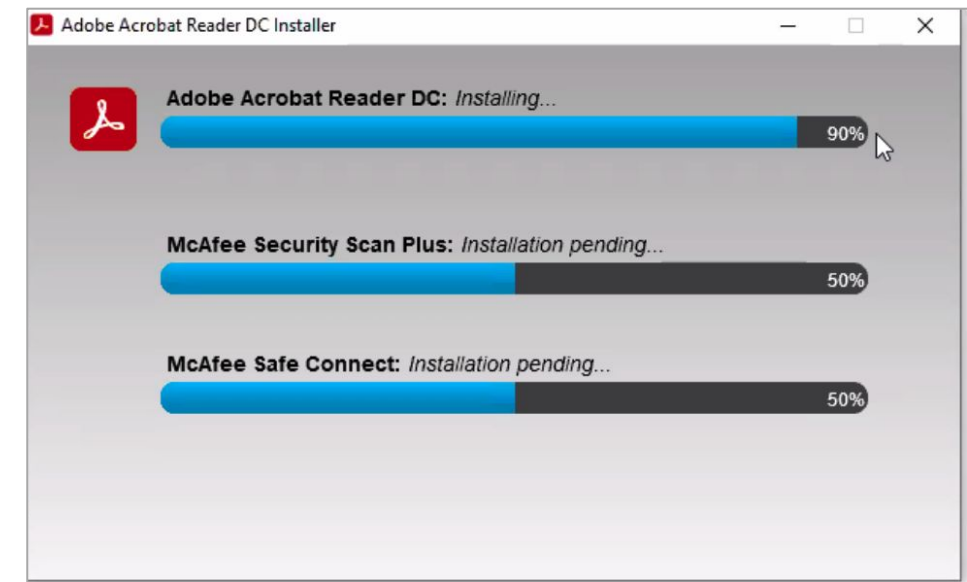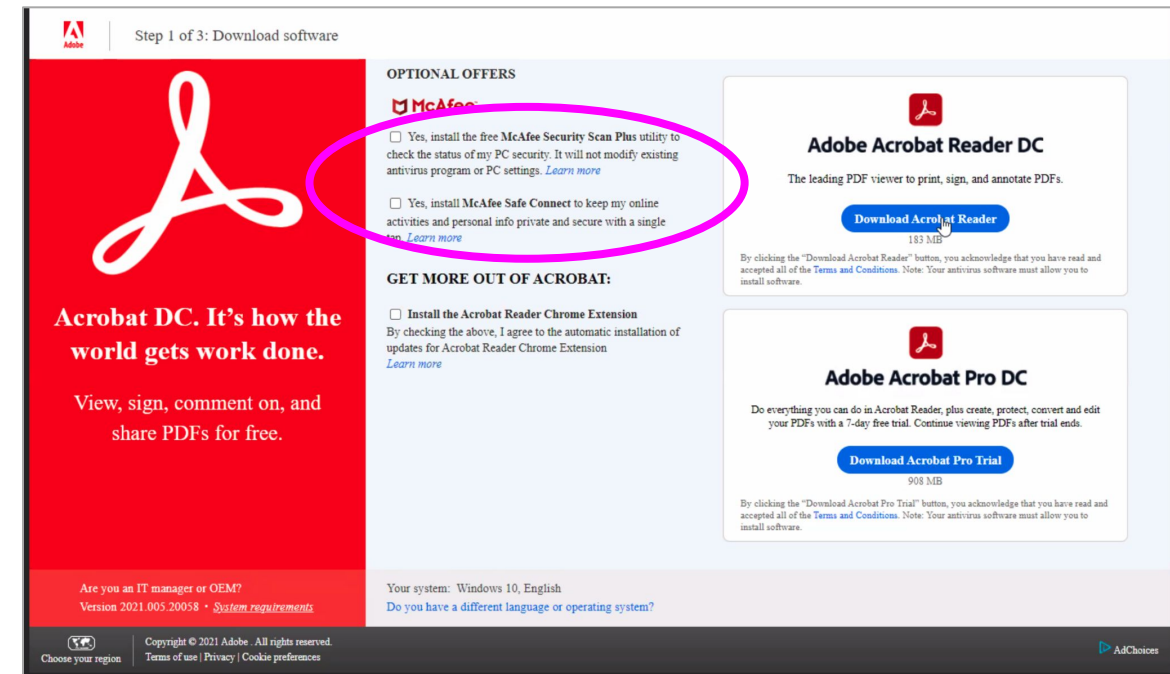
Issues with **Find Downloaded File** step + **iOS/Mac**

2 iOS users didn't know how to find files they downloaded

3 iOS/Mac users were surprised and annoyed that they had to use Adobe Acrobat to open VA forms

*"It is a pain that you have to use Adobe for some of the forms...I am getting a third master's degree, and **I have not needed Adobe up until this point**. I have been able to fill out all forms in Safari until today" (p12).*

*"As soon as I see Adobe Acrobat, I know enough from using Apple products that that's going to be a problem. It may or may not work. I understand that there are more PCs in the world than there are Macs, and so you get the largest audience by programming for the PC, but **there is a substantial number of people on Macs who use their cell phones and iPads that, to me, it's rather unbelievable** that somebody wouldn't be consciously programming for the Mac" (p2).*

Key Finding #4

Participants using a screen reader were unable to digitally sign because screen readers (e.g., JAWS) don't announce location to sign

The signature field wasn't an editable field or a button, and there wasn't a label on the field

Digital signature isn't accessible!

SECTION 5 - APPLICANT AUTHENTICATION & FACILITY ENDORSEMENT/RECOMMENDATION

ELIGIBILITY: I certify that I am currently a permanent VA employee and have been continuously employed by the VA, for a period of not less than one year immediately preceding submission of this application.

CONSENT TO RELEASE INFORMATION: For the purpose of administering the Employee Incentive Scholarship Program (EISP) award, I hereby authorize the educational institution in which I am or will be enrolled, to release to VA representatives, information regarding my student account and education information. This authorization includes information on bills, statements, charges, credits, balances, payments, past due amounts, collection activity, grades, courses, credits, GPA, registration, student ID number, academic progress, enrollment status, attendance, communications with school representatives deemed relevant for the administration of my scholarship, and any other information necessary to determine my status. This release is valid for any information supplied during my application for EISP, while participating in the program, and should any liability arise from program participation and become recoverable by the United States. I understand, that if I voluntarily withdraw this authorization after the EISP award is executed, I will be in breach of agreement and liable for the damages in accordance with the provisions of title 38 United States Code Section 7675. My signature below is my explicit written consent and authorization for the disclosure of the above information to VA representatives upon their request.

darrel

Print Name of Employee (Applicant)   Signature of Employee (Applicant)   Date

I certify that I have reviewed this application and recommend the applicant named above for participation in the Employee Incentive Scholarship Program.

darrrel

Print Name of VA Facility Director or designee   Signature of VA Facility Director or designee   Date

Note: All applications signed by a designee must have authorization documentation on file with S&CE or submit written authorization with the application.

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Key Finding #5

Screen reader users found it challenging to fill out forms in Adobe Acrobat

- Missing field labels
- Incorrect tab order
- Multiple input fields under one label (i.e., last name, first name, and middle name)

Note: Above feedback was spontaneous from participants while filling out a few random fields on the forms. A full accessibility review was out of scope for this research.

Hard to fix because the 400+ VA forms are owned by different groups

Key Finding #6

Find a Form search results were hard to scan with a screen reader

- No headings for each result
- So screen reader users had to tab down 6 lines through each search result before they could see the next one.

RECOMMENDATION: Add an H3 heading above each search result (now FIXED!)

Recommendations

1. Encourage VA form owners to **replace every fillable PDF form with a more accessible format** across devices, platforms, browsers, and screen readers (e.g., web form or maybe DocuSign). Start with the most frequently downloaded forms.

2. Since fillable PDF forms will continue to exist at least in the near term, **add instructions above *every* download link**, including those on form detail pages (as already planned)
    -   Detailed instructions should be device-, operating system-, and browser-specific ([ex](ex))
    -   Be clear that *mobile devices cannot be used* (even though **15%** of Find a Form visits and **46%** VA.gov visits are from mobile devices, per analytics 1/1/2021-8/11/2021)
    -   Some users (esp. Mac) may be unfamiliar with how to use Adobe Acrobat (12% of Find a Form visits are from Macs, per analytics 1/1/2021-8/11/2021)

3. Encourage VA form owners to **fix the accessibility problems encountered in these forms**, especially the digital signature fields. Recommend 508 compliance for all forms.

Next Steps

Discuss findings and recommendations with Decision Tools team and VA form owners

Reminder: Please don't share this presentation with VA form owners yet

Questions?

Additional slides for
Monday Design/Research/Content sync mtg…