10-10CG
Usability Test April 2021

Topline Summary & Recommendations

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Goals

The goals of this user research study were to:

- Validate the usability of the updated sign as a representative workflow.
- Test the usability of the "upload a document" content and understand what types of documents the user would upload.
- Determine if the cognitive understanding of Primary Family Caregiver versus Secondary Family Caregivers is improved.

Intro to usability study

On April 13th & 14th 2021

- We conducted a task-based usability study in staging, remotely with Zoom.
- We talked to 5 participants
  - 4 caregivers
  - 1 veteran (who has a Primary Caregiver in the program).

Research results & recommendations

Sign as a Representative Workflow

Representative documentation question

Overall, the redesigned representative documentation question page worked well. Participants were much more comfortable moving through it than in the previous round of testing, and it did not create a barrier for form completion.

Recommendation:

Implement this design.

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Step 4 of 5: Representative documentation

Some family caregivers are also the Veteran's legal representative. These representatives have the legal authority to make certain decisions for the Veteran.

Here's what you should know:

- You can still continue with this application to apply for the program even if you're not the Veteran's legal representative.

- If you are the Veteran's legal representative, you can upload a document to show your legal status now. If you don't upload your document now, we'll ask you to provide it later.

Do you have a legal representative document you'd like to share with us?

○ Yes. I want to upload my document now.

○ Yes. But I'll provide my document later.

○ No. I don't have this document

What type of document does a legal representative need? ⌄

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More info dropdown

Research insight:

- Caregivers and Veterans are unsure about what "counts" as a legal representative.
- Multiple research participants had a Medical Power of Attorney through the VA, but didn't think that this could be used here

Recommendation:

Include more examples of what "counts" and what "doesn't count,", **e.g. tell people if VA Medical Power of Attorney can be used.**

What type of document does a legal representative need? ^

To show that you're the Veteran's legal representative, you'll need to upload one of these current documents:

- Power of attorney, **or**
- Legal guardianship order, **or**
- Another legal document that confirms your legal status as the Veteran's representative. This document can be from a federal, state, local, or tribal court.

Note: Being a Veteran's closest family member or next of kin doesn't mean you're their representative. You need a separate legal document to show your status as the representative.

Program Team Ask: Does VA medical POA "count"? Can you send us other specific examples that we can reference?

Upload Documents page

Research insight:

- This page was fairly self-explanatory to most users. Participants who said that they were representatives said that they would have their documentation handy, and were accustomed to uploading documents.

  Note: In this study, all of our participants were fairly thorough and digitally comfortable. In the future we should try to conduct usability tests with less digitally comfortable participants.

- Participants expressed that the copy was a little strange. *"How can you scan a copy on your phone?"*

Recommendation:

Update first paragraph copy and then implement.

Step 4 of 5: Representative documentation

Upload your legal representative documentation

You will first need to scan a copy of your document onto the same device that you are submitting your online application (i.e. computer or mobile phone). You can upload the document from there.

Guidelines for uploading a file:

- File types you can upload: .pdf, .jpeg, or .png
- Maximum file size: 25MB

A 1MB file equals about 500 pages of text. A photo is usually about 6MB. Large files can take longer to upload with a slow internet connection.

[Upload]

What type of document does a legal representative need? ⌄

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Signature page

Research insight:

- Two participants who saw the representative box were unclear whether to sign the veteran's name or their own when it asked for the representative's signature.
  - One signed her own name
  - One signed the Veteran's name
- One participant found it strange that she was being asked to enter her name twice on the signature page (once as representative, once as Primary Caregiver).

Representative's statement of truth

I certify that I give consent to the individual(s) named in this application to perform personal care services for the Veteran upon being approved as Primary and/or Secondary Family Caregivers in the Program of Comprehensive Assistance for Family Caregivers.

I have read and accept the privacy policy.

Enter representative's full name (*Required)

On behalf of
John Doe

☐ I certify the information above is correct and true to the best of my knowledge and belief. (*Required)

Signature page

Recommendation:

Since our research did not show that the newer design was necessarily worth the complexity, implement the simpler version of the signature box that is closer to the paper form.

In this version, participants can enter either the Veteran's or Representative's full name.

Representative documentation   **+**

Please review information entered into this application. The Veteran and each family caregiver applicant must sign the appropriate section.

Veteran's or Representative's statement of truth

I certify that I give consent to the individual(s) named in this application to perform personal care services for me upon being approved as Primary and/or Secondary Family Caregivers in the Program of Comprehensive Assistance for Family Caregivers.

I have read and accept the [privacy policy.](#)

Enter Veteran's or Representative's full name (*Required)

[   ]

☐ I certify the information above is correct and true to the best of my knowledge and belief. (*Required)

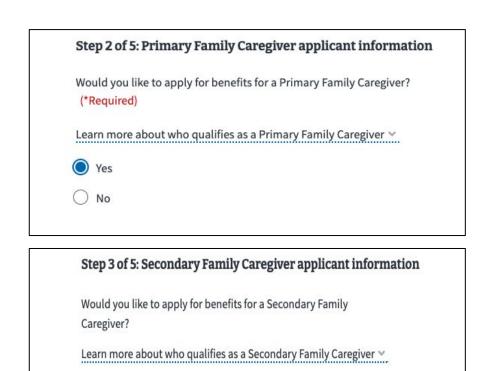### Primary Family Caregiver applicant's statement of truth

Participant understanding of Primary Family Caregiver (PFC) vs. Secondary Family Caregiver (SFC) roles/responsibilities

PFC/SFC Question pages

The new language helped a bit (no one confused the question with primary care physician, as in the past test), but it wasn't perfect.

Research insight:

- Several participants thought the question asking if they wanted to apply for benefits for a Primary Caregiver was "repetitive" and unnecessary - they felt like they already answered that question by applying to the program.
- Multiple participants expressed that they needed more information about what a Secondary Caregiver is.
- One participant specifically said that she wanted the primary and secondary questions on a single page, with more explanation of what they entail.

Step 2 of 5: Primary Family Caregiver applicant information

Would you like to apply for benefits for a Primary Family Caregiver?
(*Required)

Learn more about who qualifies as a Primary Family Caregiver ⌄

- ● Yes
- ○ No

Step 3 of 5: Secondary Family Caregiver applicant information

Would you like to apply for benefits for a Secondary Family Caregiver?

Learn more about who qualifies as a Secondary Family Caregiver ⌄

- ○ Yes
- ● No

"Maybe if there is a way to have primary and secondary together to explain the differences so I know right off the bat what I'm applying for"

PFC/SFC Question pages

Recommendation:

- Keep the new language, but in the near future prioritize improving the user experience by rethinking both the structure and copy of the question pages, potentially combining them. *(as previously suggested by Caregiver program team)*

- In the future, consider revisiting "tell me more" copy in order provide more details of what each role entails and what benefits that person receives in the designated role.

Previous ideation

› Comprehensive assistance for family ca

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2 of 4 **Family Caregiver information**

You may apply for benefits for multiple caregivers under this program.

Specifically, you may apply for benefits for a single primary family caregiver, and up to two secondary family caregivers.

Tell me more about these options ⌄

Who are you applying for benefits for?

- ☑ A primary family caregiver
- ☐ A secondary family caregiver
- ☐ Another secondary family caregiver

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Research results & recommendations

Veteran Medical Facility

Recent medical care page

The medical facility page continues to cause confusion for participants, as discovered in past usability studies. Specifically, the first question asking where the veteran most recently received medical care caused issues.

‎

Step 1 of 5: Veteran information

Recent medical care

Please enter the name of the medical facility where the Veteran **last received medical treatment.**

Name of medical facility

[   ]

Was this a hospital or clinic?

[⬍]

VA health care services

Please select the VA medical center or clinic where the **Veteran receives or plans to receive health care services.**

A Caregiver Support Coordinator at this VA medical center will review your application.

State **(*Required)**

[⬍]

VA medical center **(*Required)**

[⬍]

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Recent medical care page

"When it comes to recent medical care- what's the reason behind asking that? What does where the veteran is receiving medical care have to do with the caregiver application?"

Research insight:

- One participant didn't understand the reasoning behind why this question was being asked and felt like it was confusing and unnecessary.
- Several participants didn't know how to answer the "most recent medical care" question because their Veteran received different treatments (primary care, oncology, counseling, etc.) at different locations, and they weren't sure which type the Caregiver Program is interested in.
- Several participants didn't know if they should answer "clinic" or "hospital" in the dropdown.
- One participant couldn't find their facility in the dropdown for where the veteran plans to receive care.
- One chose a location that was quite far from her in the "closest major city."

Program Team Ask: Would it be possible to remove the first question from the form? (It is currently not a required section)
- If not, provide clarity into why we need it and work together to create better copy / options.

Research results & recommendations

Other Findings

Other Findings

Possible future updates:

- One participant expressed concern about the Social Security number showing fully on the Review page. (She often uses public computers), **in the future consider ways of blocking SSN on review page.**
- Several caregivers said they typically put their own/shared contact information in for the veteran's contact information and/or live with the Veteran. **In the future consider having a checkbox to select same address, phone, etc. to avoid writing the same thing twice.** *-This is not a new finding, but rather further support for the suggestion made by the Caregiver program team, and is already included on the roadmap.*

Next Steps

1 **Update flow**

- Update copy on document upload page
- Update copy about what type of document qualifies as POA
- Keep simpler signature box solution

2 **Publish updates**

- Representative workflow

Further Design Work & Research

Primary Vs. Secondary CG

- Redesign structure/copy
- Provide examples

Medical facility page

- Remove recent treatment question?
- Update copy and get clarification

Future

- Better understand how to reduce repetitive input
- Revisit review page for security and user experience