# **Research Plan for a Usability test of Board Appeals (NOD)**

VSA Claims & Appeals Team, Board Appeals (NOD), Christian Valla, March 2021.

## **Background**

This is a usability test of NOD (Notice Of Disagreement, also called a Board Appeal).

As a veteran, I should fill out and submit a Notice of Disagreement if I have received a decision from a local VA office or a higher-level adjudicator with which I disagree, and I would like one or more issues to be decided by a Veterans Law Judge.

I can choose to appeal all or only some of the issues previously decided, however, ONLY those issues that I list on my Notice of Disagreement will be considered.

Previously NOD has only existed as a paper form:

<https://www.va.gov/vaforms/va/pdf/VA10182.pdf>

NOD is a new product. A comprehensive usability test with actual veterans is needed.

## **Goals**

* To understand the current user experience, what usability issues exist, including confusing or unclear content/copy.
* Is the flow easy to understand and do participants have all the info they need?
* Do participants feel that an adequate amount of information is presented?
* Can participants go through the flow by themselves, without blockers or problems?

## **Research questions**

Overall:

* What usability issues exist within the flow?
* Are participants able to successfully navigate to and through the form?
  + What deviations exist from the anticipated happy path of the form and why?
* What kinds of frustrations and usability issues do participants experience throughout the flow? Do patterns exist? Why?
* Can participants successfully complete the flow without assistance from the moderator?
* Is the content and copy across NOD clear and concise?
* Is there ambiguity or confusion experienced by the participants within any of the pages within the NOD form?
* Do the participants feel that they have all the information they need to complete the NOD flow?
* What is most helpful for the participants throughout the flow?
* What is most confusing or unclear for the participants in the NOD form?
* What part of the NOD form is most frustrating or difficult for the participants to complete?
* Do participants feel that they are asked about the appropriate level of details?
* Are the participants uncomfortable with any questions? If so, why?
* If they could change one thing within this experience, what would it be?

Details:

* NOD intro page: Is anything here confusing or unclear for the participants?
* Contact info page: is anything here confusing or unclear?
* Board review options: do users understand the purpose of this page?
  + Do users understand the terms used on this page?
  + Is anything here confusing or unclear?
  + Do users feel that they have all the information they need in order to make this decision?
* Specific issues to be appealed page:
  + Is anything on this page confusing or unclear?
  + Do users understand the terms used on this page? (Example: adjudicated issues)
  + Do users feel that they have all the information they need in order to make fill out this page?
* Opt-In from SOC/SSOC checkmark: Do users understand what they are actually doing when they decide to check / not check this box?
  + Do users understand what “legacy appeals/legacy appeals process” means?
  + Do they understand the full ramifications of this choice?
* Overall impressions of the form.
* Other comments.

## **Method**

* We will be conducting a remote, moderated usability study with 8 Veterans (separated from active duty).
* We will test a prototype of the NOD form: (link here) (Invision).
* Allowing users to interact with a prototype of the NOD form, on their own, in their own environment, can help us detect usability issues they encounter, in a test situation that is as close as possible to a real user experience.
* We will use Zoom to conduct these sessions.
* We will ask Veterans to navigate to the Invision prototype (a link provided in the Zoom chat) and have participants share their screen with us via Zoom.
* We will ask the participants to go through the NOD form from its beginning to its end.
* We will ask participants to speak out loud as they move through the form, and probe for usability issues and relevant feedback.
* Pre-test interview: probe into what pain points, frustrations remain in the form and how they can be removed.

## **Participants and Recruitment**

We would like to interview 8 participants.

* In order to get 8 participants, we would like Perigean to schedule 13 participants total, with the expectation that there will be a max of 5 no-shows.
* For the participant's Perigean recruits:

Primary criteria / Must have:

* All Participants must be Veterans (separated from active duty).
* All participants must have submitted a claim or an appeal with the VA at some point.
* ⅔ of participants have submitted an appeal with VA at some point.
* ⅓ of participants have not submitted an appeal with VA.
* Participants must be able to use Zoom, locate and use the chat function in Zoom, and share their screen through Zoom.
* Must be willing to and able to interact with an Invision prototype and provide feedback on this experience.

Secondary criteria / Would like to have:

* Participants should be able to describe to the researcher what they are trying to accomplish, what they are experiencing, and what they are thinking, as they are interacting with VA.gov.
* 50% women, 50% men.
* 50% identify as an ethnicity/race other than Caucasian.
* At least 1 participant 35 or under and 1 participant over 55.
* At least 1 participant without a college degree.

When?

* Timeline: The timeline for this study: 22-29th of March 2021.
* Prepare: When will the thing you are testing be ready? It is ready. 19 March, 2021. <https://vsateams.invisionapp.com/share/8Y10I6K7DU9R#/screens/447558866>
* Length of Sessions: up to 60 minutes, and allow 30 minutes between each session.
* Pilot: 24 March 2021, TBD pm EST
* Test days: 25, 26 and 29th of March Availability: 11 am - 5 pm EST

Team Roles

* Moderator: Christian V.
* Conversation guide writing and task development: Christian V.
* Participant recruiting & screening: Perigean
* Project point of contact: Christian V. (Phone: 626 491 4488, email: cvalla@governmentcio.com
* Participant(s) for pilot test: TBD
* Note-takers: Perigean (and Kevin S.?)
* Observers: Robin G., Anna C., Shawna H., Kevin S., Veronica H., Kelly L., Maria V., Ed M.,

Resources

* Project Brief: (Product epic)  
  *The project brief should live in the appropriate va.gov-team product folder, simply paste a link to it here*
* Convo Guide  
  Discussion guide should live in the appropriate va.gov-team product folder, simply paste a link to it here
* Synthesis Link to any documents used for synthesis (Mural or Realtimeboard boards, excel sheets, other data outputs, etc.)
* Lessons Learned  
  *Did you have any takeaways from the process of this research round that you want the team to remember for the future? Document them here.*
* Read-Out/Results
* Read-out presentation
* \*\* Don't forget to add a link to your research folder to the research tracker! [https:......md](https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/platform/research/research-history.md)]()