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Office of Community Care (OCC) Veteran Portal

**Facilitation Guide**

03.24.2021

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# Purpose

#### Users will be asked to (1) prioritize portal pages that are most important to their needs and (2) customize the order of modules, per page, based on their needs. This activity will be facilitated in MURAL.

## Part One: A/B Testing Instructions

After designing the information architecture (card sort), users will be presented with two variations of modules, per portal page.

## Part Two: Co-Design Instructions

#### Following A/B testing, users will also have the option to make changes to the module piece they selected so that the HCD team can ensure an optimized experience.

# Research Questions

## Information Architecture, Card Sort

1. What information is most important for users?
2. How do users prioritize the information they are searching for?
3. How are users most likely to navigate the portal?

## Tier Formats, A/B Testing

1. What level of complexity is needed for users to receive the information they need without feeling overwhelmed?
2. What design elements or best practices stand out for users?

## Refining Modules, Co-Design

1. What tools can VA offer to help users with their community care needs?
2. What defines a "comprehensive and helpful" portal for users? (This question will help the HCD team define acceptance criteria during the Design phase.)

# Introduction and Agenda

***[Introduce yourself and who else is on the phone (notetakers, observers, etc.)]***

We are a team with the Veterans Experience Office and Office of Community Care working to better understand how Veterans, beneficiaries, and caregivers want to access and interact with information about their community care online.

We have created mock-ups of multiple webpages, each with a variety of building blocks. We are going to ask you to help us reorder, add, and remove these blocks until we create a page that suits your needs. I can’t stress enough – we’re testing the pages and building blocks, not you, and your honest feedback will help us create a more desirable experience. Please don’t hold back. Even small or nitpicky things are helpful. You will not hurt our feelings if you are brutally honest! Once we have reviewed all the pages, we'll ask you about your overall impressions of the experience and take note of any general comments you have.

If you don’t mind, we would like to record our conversation only to be referenced by our team in case we miss anything in our notes. Is that ok with you? ***[start recording]*** And while we will be taking notes, your responses will be anonymous—nothing will be connected to your name. For us to continue, I do need your verbal consent. Do we have your consent to take notes during the interview and to use your anonymized quotes in our research? ***[document consent]***

Do you have any questions before we begin?

## **User Background**

#### Time: 5 minutes

* Could you tell us a little bit about yourself?
* As we go through the building blocks, please feel free to jump in with anything about your community care experience that might help us understand how you would like to access information or what actions you would take.

## **Information Architecture**

### Card Sort, 5 Minutes

### Introduction

This first activity has two parts:

1. We would like to understand what informational pages you expect to see on a VA community care portal.
2. We would like to understand the information you expect to be featured on each page that you prioritize.

### Scripted Questions

* We are going to show you three key pages the portal is expected to have. Please organize these pages by priority.
  + Which page do you expect to land on?
  + Which page do you expect to see first on the menu?
  + What button or link would you expect to see to direct you here?
  + Where would you expect to find these pages?
  + How would you want to access this content?
* Each page will have its own sub menu of options. Here is a list of information you could expect to see on this page.
  + What information about community care do you expect to find on <this> page?
  + Does any of this information feel unhelpful to you?
  + Is there anything missing that you would expect to see on this page?

## **Individual Portal Page Features**

### A/B Testing with Co-Design, 10 minutes per page

## Portal Homepage

### Introduction

We want the portal homepage to quickly navigate you to everything you need to know about your community care journey. This page is designed to be an overview that features key details, and links that help you understand where you need to take action or learn more information, but we need you to tell us what the most important “key details” are.

### Scripted Questions

#### Tier: Information Bar

**Module Option A: Appointment, consultation, and authorization overview**

**Module Option B: Community Care Tracker, “You are Here” Diagram**

* Of these two options, which do you prefer in terms of helpfulness and conciseness?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

**Co-Design**

* Looking at the option you chose…
  + Is there anything you would like to add or change?
  + Does any of the information presented feel unhelpful or unnecessary?
  + Is there any part of this image that you would like to move or adjust?
* **[Question(s) for Option A]**
  + Looking at the information bar designed here…
    - Is there anything missing?
      * If yes, what would you like to know?
  + What do you expect to happen when you click… (dropdown, expansion, redirect, etc.)?
    - Cancel or reschedule?
    - Track progress?
* **[Question(s) for Option B]**
  + Looking at the information bar designed here…
    - Is there anything missing?
      * If yes, what would you like to know?

#### Tier: Announcements

**Module Option A: Single static banner, cross-page rectangle**

**Module Option B: Sticky form, side-page square**

* Of these two options, which do you prefer in terms of helpfulness and conciseness?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

**Co-Design**

* Looking at the option you chose…
  + Is there anything you would like to add or change?
  + Does any of the information presented feel unhelpful or unnecessary?
  + Is there any part of this image that you would like to move or adjust?

#### Tier: My Care Team

**Module Option A: Care team with “Provider Details” dropdown**

**Module Option B: Standard provider list, limited to no functionality**

* Of these two options, which do you prefer in terms of helpfulness and conciseness?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

**Co-Design**

* What information would you expect to see on this section of the page?
* Looking at the option you chose…
  + Is there anything you would like to add or change?
  + Does any of the information presented feel unhelpful or unnecessary?
  + Is there any part of this image that you would like to move or adjust?
* **[Question(s) about filtering]**
  + What filters would you expect to see on this section of the page?
  + How would you like your selected filters to be organized?
  + What information would you expect to see here?
    - What information would you like to know about your provider?
    - Using these pieces of information, how would you show information on appointment authorizations?
      * Is there anything missing here that you would like to know about authorizations at a glance?
  + What do you expect to happen when you click… (dropdown, expansion, redirect, etc.)
    - secure message?
    - clinic address?
    - view appointment history?
    - schedule next visit?
    - view travel benefits?
  + Is there anything missing from this section that you would like to know?

#### Tier: Medical History

**Module Option A: Prescriptions and DME featured, other options linked**

**Module Option B: All information featured**

* Of these two options, which do you prefer in terms of helpfulness and conciseness?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

**Co-Design**

* What information would you expect to see on this section of the page?
* Looking at the option you chose…
  + Is there anything you would like to add or change?
  + Does any of the information presented feel unhelpful or unnecessary?
  + Is there any part of this image that you would like to move or adjust?
* **[Question(s) for Option A]** 
  + What do you expect to happen when you click… (dropdown, expansion, redirect, etc.)?
    - Pay a bill?
    - Billing history?
    - Financial support?
    - FAQ?
  + Is there anything missing from this section that you would like to know?
* **[Question(s) for Option B]**
  + Using the pieces provided, help us format your provider information.
    - How would you like to view your provider information?
    - Is there anything missing here that you would like to know?

#### Tier: Know Your Benefits

* How do you prefer new information presented to you? Are you more visual or auditory?
  + Do you prefer pictures or streamlined, bulleted, and direct information?
  + Please choose your preferred narrative.
    - **Option A: Limited text with pictures**
    - **Option B: Streamlined, bulleted text**
    - **Option C: Exhaustive paragraph**

#### Overall Page

* Now that you are more familiar with the content of this page, how would you organize the building blocks in order of what you would like to see first?

## Billing and Financial History

### Introduction

Our intention for this page is to house all information related to billing and finances in one place. We want it to streamline the experience of paying bills, viewing statements, and seeking financial support.

### Scripted Questions

#### Tier: Account Summary

**Module Option A: Bill balance and account information with a “pay now” redirect**

**Module Option B:** **Account information, most recent statement “view now”, “manage payment plan” if applicable**

* Of these two options, which do you prefer in terms of helpfulness and conciseness?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

**Co-Design**

* What information would you expect to see on this section of the page?
* Looking at the option you chose…
  + Is there anything you would like to add or change?
  + Does any of the information presented feel unhelpful or unnecessary?
  + Is there any part of this image that you would like to move or adjust?
* **[Question(s) for Option A]**
  + Looking at the account summary designed here…
    - Is there anything missing?
      * If yes, what would you like to know?
    - What do you expect to happen when you click ‘pay now’?
* **[Question(s) for Option B]**
  + Looking at the account summary designed here…
    - Is there anything missing?
      * If yes, what would you like to know?
    - What do you expect to happen when you click ‘view now’
    - What do you expect to happen when you click ‘manage payment plan’

*Tier: Pay your Bill*

**Module Option A: Statement and balance information with pay.gov imbedded**

**Module Option B:** **Statement and balance information, redirecting to pay.gov**

* Of these two options, which do you prefer in terms of helpfulness and conciseness?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?
* **[Question(s) for Option A or B]**
  + Is there any element that is missing that would help you in paying your bill?

#### Tier: Billing History

**Module Option A: Billing timeline with option to expand for more information**

**Module Option B:** **Billing timeline with redirect to more information**

* Of these two options, which do you prefer in terms of helpfulness and conciseness?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

**Co-Design**

* What information would you expect to see on this section of the page?
* Looking at the option you chose…
  + Is there anything you would like to add or change?
  + Does any of the information presented feel unhelpful or unnecessary?
  + Is there any part of this image that you would like to move or adjust?
* **[Question(s) for Option A or B]**
  + Looking at the statement bars...
    - Is there anything missing? What would you like to be included?
    - What do you expect to happen when you click 'check balance’?
  + Looking at the 'select filter’ option, what would you expect to be able to filter by?

#### Tier: Financial Support

**Module Option A: Images with dropdowns**

**Module Option B:** **All content presented on the page, with buttons for redirect when required**

* Of these two options, which do you prefer in terms of helpfulness and conciseness?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

**Co-Design**

* What information would you expect to see on this section of the page?
* Looking at the option you chose…
  + Is there anything you would like to add or change?
  + Does any of the information presented feel unhelpful or unnecessary?
  + Is there any part of this image that you would like to move or adjust?
* **[Question(s) for Option A]**
  + What would you expect to happen when clicking on 'Payment Plans’, ‘CoPayment Exemptions’ and ‘Debt Management’?

#### Overall Page

* Now that you are more familiar with the content of this page, how would you organize the building blocks in order of what you would like to see first?

## Community Care FAQ Page

### Introduction

We want the FAQ page to answer all your community care questions or quickly connect you to the appropriate staff member to help, but there are many ways to do that.

### Scripted Questions

#### Tier: Welcome Banner

**Module Option A: Simple banner with page title overlay and “contact us” hyperlink**

**Module Option B:** **Page title separate from banner, banner with search bar**

* Of these two options, which do you prefer in terms of helpfulness and conciseness?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

**Co-Design**

* What information would you expect to see on this section of the page?
* Looking at the option you chose…
  + Is there anything you would like to add or change?
  + Does any of the information presented feel unhelpful or unnecessary?
  + Is there any part of this image that you would like to move or adjust?

#### Tier: Get Help

**Module Option A: Help options are clearly featured top of page**

**Module Option B:** **No help options featured, but global “help” widget still evident**

* Of these two options, which do you prefer in terms of helpfulness and conciseness?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

**Co-Design**

* What information would you expect to see on this section of the page?
* Looking at the option you chose…
  + Is there anything you would like to add or change?
  + Does any of the information presented feel unhelpful or unnecessary?
  + Is there any part of this image that you would like to move or adjust?
* **[Question(s) Related to Option A]** 
  + What would expect each of these buttons (secure messaging, help, desk, and frequently asked questions) to do when you clicked on them?

#### Tier: FAQ Overview

**Co-Design**

* What information would you expect to see on this section of the page?
* Looking at the option you chose…
  + Is there anything you would like to add or change?
  + Does any of the information presented feel unhelpful or unnecessary?
  + Is there any part of this image that you would like to move or adjust?
* **[Question(s) Related to Option B]** 
  + Are the support topics listed representative of your expectations?
  + Are there any categories that are unclear?
    - If yes, what would you expect it to say?

#### Tier: Community Care FAQ / Guide

**Module Option A: Option to download guide**

**Module Option B:** **Option to filter and click through FAQ**

* Of these two options, which do you prefer in terms of helpfulness and conciseness?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

**Co-Design**

* What information would you expect to see on this section of the page?
* Looking at the option you chose…
  + Is there anything you would like to add or change?
  + Does any of the information presented feel unhelpful or unnecessary?
  + Is there any part of this image that you would like to move or adjust?
* **[Question(s) Related to Option B]** 
  + What is your preference, the category boxes (featured above) or this list on the side?

#### Overall Page

* Now that you are more familiar with the content of this page, how would you organize the building blocks in order of what you would like to see first?

# Global Page Features

### A/B Testing, 10 minutes

## Communications Tools

### A/B Testing, 2 minutes

**Module Option A: Sticky icon, with expansion functionality**

**Module Option B: Contact/help options scattered throughout (secure messaging widget, help desk as a top banner, FAQ featured in menu as a redirect to it its own page)**

* Of these two options, which functionality makes the most sense to you?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

## Sticky Menu

### A/B Testing, 2 minutes

**Style Option A: Sticky/collapsible “menu of links”**

**Style Option B: Standard VA side bar**

* Of these two options, which functionality makes the most sense to you?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

## Iconography

A/B Testing, 2 minutes   
**Style Option A: Personality, Artistic, discrete amounts of color**

**Style Option B: Business, Standard VA, blue (no color accents)**

* Of these two options, which style do you prefer?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

## Contact Us Form

### A/B Testing, 2 minutes

**Module Option A: Dropdown to footer**

**Module Option A: Redirect to contact page**

* Of these two options, which functionality makes the most sense to you?
  + What do you like most about the option you chose?
  + Is there anything about <the other option> that you like and would like to bring over to <the option you chose>?

**Co-Design**

* Help us design the layout of this form by placing the pieces provided in your ideal format. If something is missing, use the “create your own” box. We will help you when needed.

# Closeout

### Guided Interview, 5 minutes

1. If you could have just one feature magically available to you today, what would it be?
2. How can the Office of Community Care help you feel more honored and valued when supporting your health needs?
3. Any other thoughts or questions you have before we ask you some evaluation questions?

# Evaluation Questions

### Likert Questions, 5 minutes

Before we wrap up, I have five short questions asking you to evaluate your experience with the portal you created. I am going to read you a statement and ask you to please give me a response on a scale of 1-5. One being strongly disagree, 3 being neutral, and 5 being strongly agree.

* With this tool, I would find it easier to keep track of my care.
* This tool would improve my experience with community care.
* This tool would give me faster access to my community care information.
* This tool would enable me to solve a community care issue on my own.
* I would save time using this tool.
* I would use this tool. (Y/N)

Thank you so much. We really appreciate you taking the time to speak with us today. Your willingness to share will help improve the experience of Veterans, beneficiaries, and caregivers in the future.