**Research Plan for Search My Records**

This research plan is being submitted on behalf of the Human Centered Design (HCD) team at By Light Professional IT Services. The team is currently engaged in the design of Search My Records to improve efficiency, productivity, and end-user satisfaction for enrolled Veterans.

**Goals**

1. **What product and team are you doing this research for?**

* Search My Records, a VA product of My HealtheVet, on the PHR development team.
  + The desire is to improve the efficiency (the amount of effort and resources put into the task), productivity (achieving the best output), and end-user satisfaction (fulfilling the needs and desires) when veterans are accessing and downloading a copy of their VA health records for personal usage.

2. **Background: Briefly, what is the background on this product? What would a new person on the team need to know about this product?**

* “Search My Record” is a pseudo name for this product. The name is subject to change after more research studies are conducted.
* Search My Record is created from the foundation of Blue Button, and might eventually replace Blue Button functionality.
  + This product is designed to enhance the task of finding medical records quickly and thoroughly.
  + The design provides Veterans with new functionalities (to serve both novice and advanced computer users) and capabilities (the ability to form a needed task with useful features). A Veteran can select a date range, category (health records), facility (locations), and instantly see the generated results on the screen (without having to download the records).

3. **Research questions: What question(s) do you hope to be able to answer after completing this research.**

* Is the overall layout and visual design easily understood?
  + Can Veterans easily and quickly navigate and understand how to use this new design?
  + Is there any information overload or information anxiety?
  + Would Veterans expect certain functions to function differently?
  + Is there enough information on the page to help the veteran understand how to use Search My Records?
  + Is it intuitive enough?
* Does the information architecture make sense?
  + Is the lexicon well understood? (the vocabulary, using simple words instead of complex ones).
  + Does the taxonomy make sense for searching health records? (the organization, did we break down the problem so that veterans can understand the product?)
  + Do we display a strong ontology for the veterans? (do we provide a shared/strong relationship between elements or content?)
* What are the first impressions of the product?
  + Looking at the visceral level
  + Looking at the behavioral level
  + Looking at the reflective level

**4.** **Hypothesis: What is your hypothesis for this research?**

* We believe that Search my Records will have a strong information architecture for Veterans that make it accessible, usable, and relevant when seeking to complete their tasks.

**Method**

**1. What method of research are you planning?**

* Remote moderated observations and high-fidelity usability testing.

**2. Why this method? How does this methodology help you answer your research questions?**

* Using an observation usability testing approach allows us to accurately gain information about Veterans, their tasks, and their needs.

3. **Where are you planning to do your research?**

* Remote using Zoom and Adobe XD high-fidelity prototype.

**4. What will you be testing?**

* A high-fidelity prototype of Search My Records.

**5. If remote: What tool do you plan to use (Zoom, GoToMeeting, Webex)?**

* The HCD team plans on using Zoom for remote testing and Adobe XD.

**Participants and Recruitment**

**1. Participant criteria: What are you looking for in a participant?**

* 5 - 8 participants
* Use My HealtheVet.
* At least half the participants should use Blue Button Reports or familiar with downloading medical records on My HealtheVet.
* Various age groups
* Various ranges of ethnicities
* Male and female
* All/any military branch

**2. What is your recruitment strategy?**

* Perigean will manage user recruitment.

**When?**

**1. Timeline: What dates do you plan to do research?**

* September 2021
  + Tuesday 21st 12:00pm EST – 5:00pm EST
  + Wednesday 22nd 12:00pm EST – 5:00pm EST
  + Thursday 23rd 12:00pm EST – 5:00pm EST

**2. Prepare: When will the thing you are testing be ready?**

* Friday 17th , September 17, 2021

**3. Length of Sessions: How long do you estimate each session will be?**

* 45minutes - 1hour

**4. Pilot: Which member of the design team will you pilot your research with?**

* At least one of the following teammates:
  + Bobby Bailey
  + Gavin Quinn
  + Arienne Walters
  + Jessica Robertson

**Team Roles**

Please list the people who will be serving in each role. **Include the primary phone number for moderator and the emails for moderator, notetaker, and observers. If you need Perigean to take notes for you, indicate that next to Notetaker**

|  |  |
| --- | --- |
| Moderators | Bobby Bailey  (214) 970-9501  [Robert.m.bailey@bylight.com](mailto:Robert.m.bailey@bylight.com)  [Robert.bailey1@va.gov](mailto:Robert.bailey1@va.gov)  Gavin Quinn  (651) 200-8103  [Gavin.quinn@bylight.com](mailto:Gavin.quinn@bylight.com)  [Gavin.Quinn1@va.gov](mailto:Gavin.Quinn1@va.gov) |
| Research guide writing and task development (usually but not always same as moderator): | Bobby Bailey |
| Participant recruiting & screening: | Perigean |
| Project point of contact: | Bobby Bailey, Gavin Quinn |
| Participant(s) for pilot test: | Arienne Walters, Alexia Wunder, Gavin Quinn, Bobby Bailey, Andrea Perez, Jessica Robertson |
| Note-takers: | Alexia Wunder, Bobby Bailey, Jessica Robertson and Gavin Quinn, Arienne Walters (whomever is not moderating) |
| Observers: **List email addresses for those who should attend and observe the sessions: VA Stakeholders, engineering team members, design team members, any other people who might find this research relevant to their work** | [alexia.wunder@bylight.com](mailto:alexia.wunder@bylight.com); [arienne.walters@bylight.com](mailto:arienne.walters@bylight.com); [andrea.perez@bylight.com](mailto:andrea.perez@bylight.com); [gavin.quinn@bylight.com](mailto:gavin.quinn@bylight.com); [robert.m.bailey@bylight.com](mailto:robert.m.bailey@bylight.com); [jessica.robertson@bylight.com](mailto:jessica.robertson@bylight.com); [richard.beaudoin@va.gov](mailto:richard.beaudoin@va.gov)  \*more might be added later |