# **Research Plan**

# **Team: Digital GI Bill (DGIB) - Human Centered Design**

# **Project: My VA Secure Inbox Usability Testing (11/2021)**

## **Goals**

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

This research request comes from the Digital GI Bill team for the Veterans Benefits Administration Education Service. Digital GI Bill looks to modernize the GI Bill experience in order to improve the user experience, improve claims processing, address the complexities of recent legislation, and integrate the legacy IT systems. This specific research plan comes from the Human Centered Design (HCD) agile team as we look to conduct usability testing for a Secure Inbox and email notification prototype to understand our stakeholders’ needs for an alternative method of communication with VA.

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

The prototype (product) that is the focus of our testing, will be presented as a series of high-fidelity wireframes that simulates a user’s access to a secure inbox and email notification center linked from *My VA Dashboard*. Design features from the prototype have incorporated user feedback, elicited from our 75 interviews conducted earlier this year. The design components are aligned with VA.Gov design system priorities, and strategy for the usability testing has been approved by VA Product Owners working with the team.

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

As we observe the beneficiaries’ user experience as they navigate through the Secure Inbox prototype, we hope to:

* Understand if the location and navigation to the inbox is intuitive for users and what they would expect from the product
* Determine whether the functions for reading, drafting, sending, and archiving a message are intuitive and usable
* Understand how beneficial it is for users to have access to messages for all benefits (education, health care, etc.) in one location with filtering
* Check to see if users expect to find important documents from VA in the secure inbox and how they would hope to easily find them in the inbox

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

We hypothesize that users will be pleased by the capabilities of our prototype, since it introduces a new function of streamlined communication, which was currently occupies a high volume with the education call center. However, we also believe that there will be further refinement necessary to meet the diverse needs of all users.

## **Method**

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

The HCD team will be conducting usability testing sessions for the Secure Inbox prototype while tracking both qualitative and quantitative metrics. All usability testing will be conducted in a remote, moderated setting. Participants will receive a Perigean Zoom meeting link before their session and will join the link at the beginning of the session.

1. **Methodology:**

We will be using high fidelity prototypes to conduct usability testing. After joining the Zoom Meeting link, participants will receive a link to the prototype in the meeting chat. We will ask participants to navigate to the InVision board link and share their screen so we can observe the participant experience. Participants will be given open-ended tasks to complete where they will be able to freely navigate between screens. Time metrics will be kept for certain objectives.

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

By inviting users to participate in qualitative usability testing, the HCD team will better understand the end-to-end experience. The research is designed to elucidate specific areas for improvement within the prototype. We will be taking notes throughout the test and incorporating the Optimal Workshop software to capture data points and highlight areas for improvement within the user interface. We will leverage the feedback from our stakeholders to inform more intuitive changes.

The quantitative measures collected during sessions will look to consider individual’s accessibility and inform us whether tasks are duplicative and time-consuming, or intuitive and simple. The Secure Inbox was created to make the experience of contacting VA *easier* for the Veteran – thus, we want to emphasize the importance of collecting both quantitative and qualitative data.

**Participants and Recruitment**

1. **Participant criteria: What are you looking for in a participant?**
   * Target Sample Size: 8-12
   * Age: Diverse distribution preferred
   * Accessibility Preferences: Must have access to a computer or mobile phone to use the testing platform. Participant should indicate their preference before scheduling.
     1. **Note:** VA has identified underrepresented demographic populations that should be prioritized for user engagement and feedback sessions. We would like to recruit the following Veteran groups below:
        1. Live in rural or abroad
        2. Are above the age of 55
        3. Identify as Latinx, Biracial, Asian, Native, or LGBTQ+
   * Geographical Diversity: Diverse distribution preferred
   * Login Requirements: Access Zoom (as a guest)
   * VA Benefit Requirements: GI Bill Beneficiary
   * Familiarity with Technology: Diverse distribution preferred

* **Primary criteria / Must have** –
  + Participant must have access to a computer or mobile phone to use the testing platform
* Participant be using/used GI Bill Benefits
* **Secondary criteria / Would like to have** **–**
* Optional*: My HealthEBenefits users, VA Health Care users* -

DGIB will expand our recruitment to users that go through the VA Health Care system as preliminary research suggests our product may be used by that group of users

*Diverse Samples in the following characteristics:*

* + Location of the participant and basic demographic qualifiers screening, including: age, race, sex, state of residence (country if outside the US).
  + With respect to your GI Bill education, what degree are you working toward? (1. Associate Degree 2. Undergraduate Degree 3. Graduate Degree 3. Non-College Degree Program 4. Other. 5.None).
* How many hours do you spend on a computer/week? (None, 1-5 hours, 5-10 hours, 10-20 hours, more than 20 hours/week).
* How would you describe your familiarity with technology? (very poor, poor, neutral, good, very good).

* **What is your recruitment strategy?**

Recruitment will be conducted remotely from the two sources:

1. Perigean Contract – **If approved for this research request,** we would like assistance from Perigean to recruit additional beneficiaries that fall under our primary participant criterion characteristics.

## **When?**

We plan to begin usability testing in late October, 2021. We are open to hosting usability testing sessions from 9am – 7pm (Est.). We will have the complete prototype built and finalized by Friday, October 15th. Each UT session will span 45 – 60 minutes. Exact dates and times for testing sessions are flexible but should ideally occur between October 25, 2021 through November 2nd, 2021. Reaching our maximum goal of 10 participants will determine if we need to extend the data collection time window. There will be multiple pilot runs of our usability testing. We encourage VA collaboration team to attend any of our pilot testing sessions.

## **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.

* **Moderator:**

Alternating HCD Team Members:

* + Audra Ayotte, [audra.ayotte@accenturefederal.com](mailto:audra.ayotte@accenturefederal.com), +1 571-429-8956
  + Isabel Herrick, [isabel.herrick@accenturefederal.com](mailto:isabel.herrick@accenturefederal.com), +1 571-429-9345
  + Leelah Holmes, [leelah.holmes@accenturefederal.com](mailto:leelah.holmes@accenturefederal.com), +1 571-775-5432
  + Russell Lyons, [russell.lyons@accenturefederal.com](mailto:russell.lyons@accenturefederal.com), +1 571-414-6157
  + Jake Buller, [jacob.l.buller@accenturefederal.com](mailto:jacob.l.buller@accenturefederal.com), +1 571-733-9205
  + Alexander Ferzola, [alexander.ferzola@accenturefederal.com](mailto:alexander.ferzola@accenturefederal.com), +1 571-733-9097
  + Mark Meardon, [mark.meardon@accenturefederal.com](mailto:mark.meardon@accenturefederal.com), +1 571-429-8041
  + Miya Furukawa, [miya.s.furukawa@accenturefederal.com](mailto:miya.s.furukawa@accenturefederal.com), +1 571-414-4160
  + Genevieve Hiller, [genevieve.m.hiller@accenturefederal.com](mailto:genevieve.m.hiller@accenturefederal.com), +1 - 970 - 406 - 8894
* **Research guide writing and task development:**
  + HCD Team
* **Participant recruiting & screening:**
  + HCD Team
  + Perigean (if applicable)
* **Project POC:**
  + Matthew Self [matthew.self2@va.gov,](mailto:%3cmatthew.self2@va.gov) Va.Gov Representative
  + Audra Ayotte, [audra.ayotte@accenturefederal.com](mailto:audra.ayotte@accenturefederal.com), +1 571-429-8956
  + Russell Lyons, [russell.lyons@accenturefederal.com](mailto:russell.lyons@accenturefederal.com), +1 571-414-6157
  + Ricardo Da Silva, [ricardo.dasilva@va.gov](mailto:ricardo.dasilva@va.gov), Project Product Owner
* **Participant(s) for pilot test:** 
  + HCD Team Members
  + Any Necessary Va.gov Personnel
* **Note-takers:** 
  + HCD Team
* **Observers:** 
  + - Ricardo Da Silva, [ricardo.dasilva@va.gov](mailto:ricardo.dasilva@va.gov), Project Product Owner
    - Monique Rodgers, [lakisha.rogers@va.gov](mailto:lakisha.rogers@va.gov). Project Product Owner
    - Joseph Maltby, [joseph.maltby@va.gov](mailto:joseph.maltby@va.gov), Stakeholder Engagement Team
    - Tammy Hurley, [tammy.hurley1@va.gov.](mailto:tammy.hurley1@va.gov) Project Product Owner

## **Resources**

* Project Brief: [VA.Gov GitHub](https://teams.microsoft.com/l/channel/19%3A2e79f273f6a8460ca3bb3bc85221803a%40thread.tacv2/tab%3A%3A1d020468-8ce9-49e9-b33a-b6c53d94ba1a?groupId=8839b3a3-8436-4316-a1e6-7b81fce57c7e&tenantId=0ee6c63b-4eab-4748-b74a-d1dc22fc1a24)
* Convo Guide: To upload
* Synthesis: Not yet started.
* Lessons Learned: Will be completed after usability testing sessions conclude.
* Read-Out/Results: Will be completed after usability testing sessions conclude.