

VA



U.S. Department  
of Veterans Affairs

# 526 usability test (BDD enhancements).

April 29 to May 5, 2021

# Background

This is a usability test of the Form 526 (the Benefits Delivery at Discharge version).

Several changes have been made to Form 526 in the last several months. A comprehensive usability test with veterans is therefore needed.

Veterans with a disability and who are planning to apply for a benefit for their condition(s), can use the online version of Form 526 to apply: <https://www.va.gov/disability/file-disability-claim-form-21-526ez/introduction>.

Service members in active duty, that have a discharge date between 90-180 days from today, can apply for benefits through the Benefits Delivery at Discharge program, to receive their benefits sooner after they discharge.

We have built a prototype of the online 526 Form in Invision that we will show participants.

<https://vsateams.invisionapp.com/console/share/K310RJ11GMWE/600538602>

# Research Goals

- Understand the current user experience, what pain points and usability issues exist, including confusing or unclear content/copy.
- Do participants think any necessary information is missing throughout the form?
- Can participants go through the flow by themselves, without any problems or blockers?

## Methodology

# Method

We conducted a remote, moderated, task-oriented usability study, using Zoom

- Participants logged into Zoom with their computer, shared their screen, and opened up the prototype (Invision) for us to observe their interactions.
- The participants were given tasks to perform within the prototype.

The structure of the study:

- 5 minutes for introduction and warm-up questions.
- Approximately 40 minutes with usability tasks and questions
- 5 min for exit questions and wrap-up

The participants in this study consisted of 7 veterans:

- 4 male and 3 female
- Four was between age 25 and 44, three between age 55 and 64.
- Highly educated group: Five had a Bachelor or a Master degree, one had an Associate's Degree, and one had some college.

# Findings

# Findings Summary

1. **Five participants** had either **heard about** the BDD program **or submitted a BDD claim**. **All** had **used a VSO** and believed the help from a VSO was critical.
2. **Overall** participants **found the Form** to be easy to fill out and mostly **self-explanatory**.
3. A few participants were **concerned that not everyone would be able to remember the start date** of their Service or Reserve period.
4. When a participant is asked to list “New conditions”, there is **inconsistent use of the term Conditions and Disabilities**.
5. Several participants **confused by the order** in which **we ask for** STR, Private medical **records and Other evidence**. A few participants were confused about uploading **Service Treatment Records** as they **expect the VA to be able to pull these from the military**.
6. A few participants suggest allowing for several bank accounts or **show** the Service member **how/where they can update their bank account** info.
7. Several participants **hesitate when asked if they have uploaded all the documentation** they need. They **need help from a VSO/VSA to answer this** as they are not sure what VA needs. **Concerned if they will be able to add evidence later**.
8. On the Submitted page, most participants would like the option to print the entire, completed form, as well as save it as a PDF.

# Details of Findings 1

1. Five participants had either heard about the BDD program or submitted a BDD claim.
  - a. All had used a VSO and believed the help from a VSO was critical.
  - b. One participant suggested adding information about the possibility of getting help from a VSO/VSA to the page/form.

# Details of Findings 2

- Overall participants found the Form to be easy to fill out and mostly self-explanatory.
- Participants value the drop-downs with added information and the phone numbers that they can call if they need to.



## Details of Findings 3

- A few participants were concerned that not everyone would be able to remember the start date of their Service Reserve period.
  - If users had a nested active service period, they would click button “Add another service period”
  - If users were called upon by the Federal, they would also click “Add another service period”.
  - Participants are not sure what VA wants with regards to “Unit name” under Reserve period. If they have been in several units, should they provide the first or last unit, or the unit they spend the longest time in?
  - Participants think the use of the terms Service start/end date (for Active duty) and Obligation start/end date (for Reserve) makes sense.

## File for Benefits Delivery at Discharge

Form 21-526EZ

1 of 5 Service member details

### Military service history

Please provide your military service history.

Branch of service (\*Required)

Army

Service start date (\*Required)

Month	Day	Year
Jan	12	2003

Service end date (\*Required)

Month	Day	Year
Aug	28	2020

add another service period

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## Details of Findings 4

- When a participant is asked to list “New conditions”, there is inconsistent use of the term Conditions and Disabilities.
  - One participant argues that “Conditions” be used for new issues, and “Disabilities” be used for already existing issues/disabilities.

*VA will decide if a veterans condition or an issue is in fact a disability (...and if this should be granted benefits).*

- A couple of participants were confused why we asked for “New” conditions if this is the first time they apply for a BDD.

## File for Benefits Delivery at Discharge

Form 21-526EZ

2 of 5 Disabilities

Please tell us the new conditions you want to claim.

### New Condition

Neck sprain

Edit

Add Another Disability

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## Research Findings

# Details of Findings 5

- A few veterans were confused about uploading Service Treatment Records (STR). They asked if a Service member were requested to obtain and scan the STR (that could be several hundreds documents), and upload them. They expected the VA to be able to pull these from the military.

*If the Member needs to have digital copies of their STR in order to complete the form, the Member should be made aware of this early in the form.*

- A few veterans were confused about how we ask for STR and Private Medical Records and Other Evidence separately. A few participants missed the “Other Evidence” checkmark.

*If I could check both boxes (Private medical records & other evidence) there should be a note that tells you – I would not have known I could check both (boxes).*

- Three participants (after uploading STR) clicked on “Upload another file” in order to upload Private Medical records.
- Two participants wanted a definition or an example of what Private Medical records as well as Other Evidence could be.

## File for Benefits Delivery at Discharge

Form 21-526EZ

3 of 5 Supporting evidence

Is there any other evidence that you'd like us to review as part of your claim? (\*Required)

☒ Yes

☐ No

What type of evidence do you want us to review as part of your claim?

☐ Private Medical Records

☐ Other evidence

Which evidence type should I choose? ▼

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# Details of Findings 6

- A few participants think that the Service member might change their bank account when they discharge from duty.
  - They suggest allowing for several bank accounts
  - or at the least show the Service member how/where they can update their bank account info.

## File for Benefits Delivery at Discharge

Form 21-526EZ

4 of 5 Additional information

### Bank account

We'll pay your disability benefits to the account below. Please provide this information to avoid any delays in payment.

Account type

Account number

Routing number

Bank name

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## Details of Findings 7

- Several participants are confused, or hesitate when asked if they have uploaded all the documentation they need in order to support their claim. Several participants believe this is a question they need help from a VSO/VSA to answer.
- They are concerned that they will not be able to add evidence later.
- They are not sure what VA needs. They are not 100% sure about the consequence of their choice on this page.
- Not everyone noticed the drop down. They felt that this info was very important, and that it was somewhat hidden under the drop down.

*This seems pretty final, so I would click No just in case there is another thing worth adding – I've dealt with the VA enough to know that there is always another piece of paper.*

- One veteran suggested adding a FAQ section on this page.

## Request Benefits Disability at Discharge

Form 21-526EZ

### 4 of 5 Additional information

Have you uploaded all the documentation needed to support your claim? (\*Required)

- ☒ Yes, I have uploaded all of my supporting documents.
- ☐ No, I have some extra information that I'll submit to VA later.

How do I submit additional information? ^

If you have more evidence or are waiting on some documentation, you can send it to us in a few ways:

- Using the file upload feature in our [claim and appeals status tool](#). Please wait [time frame] after submitting this form for the claim to show up in the system.
- By sending the supporting documentation to Veterans Benefits Assistance directly. Please include [these details] and send it to [this address] so we can associate it with this claim.

# Details of Findings 8

- On the Submitted page, most participants would like the option to print that page, or print the entire form filled out, as well as save as a PDF. Two participants want to also be able to email it from this page.
  - Two participants wanted to see a time estimate (even if it was a rough estimate).
  - One participant would expect to see some sort of claim number on the page.

# Recommendations

# Recommendations

- Consider if additional information about getting support from a VSA/VSO is needed on the form.
- Add information about how/where Service members can find the start date of their Active Duty or Reserve period.
- Add info about what Unit the Service Member should choose (The last unit they were in? The unit they were in the longest?) for the Reserve Periods.
- Use the terms Conditions, Issues and Disabilities consistently. A participant suggested that Disabilities were already existing issues/disabilities (and therefore termed a Disability by the VA), while conditions are a new issue, not yet determined by VA whether it is a disability (eligible for benefits) or just an issue (not eligible). This seems to be a good way to differentiate these terms.



# Recommendations (continued)

- Clarifying the questions about uploading evidence:
  - Clarify that VA are considering 3 types of evidence: STR, Private medical records and Other Evidence. Give examples of each.
  - Clarify that VA cannot (yet) pull STR from the military.
  - Rethink using check marks for Private medical records and Other evidence. (Several participants did not see the Other evidence checkbox.)
    - If using check marks, clarify that they can check up to two boxes.
  - Consider if some info under the drop down *Which evidence type should I choose?*, should be surfaced directly on the page.
- Consider adding info about how Service members can change bank accounts later.
- When asked if the Service Member have uploaded all documentation, remove the dropdown link and make this information available directly on the page. State clearly that additional evidence can be submitted later (without any negative consequences for their claim).
  - Consider adding a FAQ section or contextual info.

# Questions?

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