

VA



U.S. Department
of Veterans Affairs

Discovery Form 526 (Phase 1). Form length & form abandonment

November 2021

Background

During usability testing and UAT we found that **Form 526 is a very lengthy form** that leads to **user fatigue** and **form abandonment**.

Participants in **UAT needed 2-4 hours** to get through the form (with support from VA SME's). No participants could go through the form under 2 hours.

Participants in the **UAT** listed **15-30 conditions** for their claim. (Average conditions for a BDD claims are 21).

We wanted to do a discovery into **how many pages** the user need to go through **in a common use case**, how Form 526 aligns with **best practices** and how it compares with the approach of an organization with comparative challenges as VA, in this case **UK.gov**.

Research Goals

Overall:

- **How many pages** are created in Form 526 for a common use case?
- **How much time** is required to complete Form 526 with our use case?
- How can Form 526 be improved to **reduce form abandonment**?
- How does Form 526 adhere to **best practices** for design of long multi-step forms?
- How does Form 526 **compare with** the design used by **UK.gov**?

Methodology

Method

We created **a use case**, were a veteran (already registered with VA.gov) sign in to VA.gov to file a claim for **3 conditions** (including combat PTSD), unemployability and additional aids.

We created a **Mural board** with all the pages, documented **best practices** for designing long, multi-step forms, and did a discovery into long forms designed by **UK.gov**.

Findings

Findings Form 526 Use case A

- [Mural board](#) showing all the pages in the use case A.
- Within our use case, we had a veteran list **3 conditions**. This created **77 pages** for the user to walk through. (My completion time seems irrelevant).
- In a previous quantitative study, veterans that filed a normal **526 claim** listed **4.6 conditions in average**. Service members that filed a **BDD** listed **21.1 conditions in average**.
- Naturally, this will make the the form substantially longer. A use case with **20 conditions** would **add between 51 and 136 pages (213 pages in total)** and **significantly more pages** if the veteran adds other forms of PTSD or other complex conditions to the claim.

Findings best practices for long forms

Set clear expectations before the start

To prepare the person for starting the form, give them **as much context as possible**.

This will **increase completion rates** for individuals that start the process.

1. **Why** is the veteran filling out this form?
2. **How long** should it take to fill out the form?
3. What is the **timeline** for the **next steps**?
4. Do they need to **prepare anything in advance** (e.g. prepare documents)?

Findings best practices

Enable browser auto-fill

- Take advantage of auto-fill function in browsers that lets users fill out standard form fields in one click.

When asking for addresses, use zip code lookup to reduce field entry

- Use a lookup service to suggest the full address.

Only ask for phone number if absolutely necessary

- People are increasingly less happy handing out their phone numbers. Research by Clicktale found that making phone number optional decreased the form abandonment rate from 39% to 4%.

Findings best practices

Clearly explain why we are asking for certain sensitive information (e.g. bank details, phone number)

- Increasing user concerns over **privacy and data security**. Explain why the data we ask for is needed, using support text below the form fields. What happens to the information they provide and who has access to it?

Use milestone submissions

- Allow users to **submit the form when** they have **reached a certain step** in the form, and then continue providing more information when convenient for the user (e.g. banking details and phone number).

Stagger questions from easy to hard

- By asking **easy questions at the beginning** of the form (without sacrificing logical order), users will speed through the initial stages and trigger ***the streak effect***: the satisfaction generated by quick progress and a sense of momentum, makes users more reluctant to abandon the form.

Findings best practices

Group related information

- Group related information into logical blocks or sets. The flow from one set of questions to the next will better resemble a conversation. Grouping together related fields will also help users make sense of the information they must fill in.

This form illustrates a poor design practice where related fields are not grouped into distinct sections. The fields are listed vertically: First Name, Last Name, Email (with a note that it will be the username), Re-type Email, Password (with a note: Min. 8 characters, 1 number, case-sensitive), Re-type Password, Address, City, State (dropdown), Zip Code (with an 'Optional' checkbox), Phone (with a 'Mobile' dropdown and a note: No spaces or dashes), Date of Birth (Month, Day, Year dropdowns), Gender (dropdown), Security Question (dropdown), and Security Answer (with a note: Not case-sensitive). The lack of section breaks makes the form look like a single, continuous list of questions.

This form illustrates a best practice by grouping related fields into distinct sections with headers: 'Personal Information' (First Name, Last Name, Date of Birth, Gender), 'Account Information' (Email, Re-type Email, Password, Re-type Password, Security Question, Security Answer), and 'Contact Information' (Address, City, State, Zip Code, Phone). Each section is clearly delineated, making the form easier to navigate and understand. The form also includes helpful notes like 'Your email address will be your username' and 'No spaces or dashes'.

Findings best practices

Pre-fill/auto-detect as much as possible.

COMPANY NAME

FULL NAME

EMAIL

PHONE

?

COUNTRY



COMPANY NAME

FULL NAME

Harvey Rodriguez

✓

EMAIL

rodriguez.har@company.com

✓

PHONE

?

COUNTRY

United State



Findings best practices

Use autofocus.

Shipping Address

United States

☐ This is a business address ?

Shipping Notifications ?

Shipment notification emails are sent to the Billing Contact.
Another recipient email address may be added below.



Shipping Address

United States

☐ This is a business address ?

Shipping Notifications ?

Shipment notification emails are sent to the Billing Contact.
Another recipient email address may be added below.



Findings best practices

Mark optional fields instead of mandatory.

COUNTRY *

United State

ZIP CODE *

e.g. 89381-6757

?

CITY, STATE *

City

State

ADDRESS

e.g. 37 Jaden Mountain, apr. 2



COUNTRY

United State

ZIP CODE

e.g. 89381-6757

?

CITY, STATE

City

State

ADDRESS
(OPTIONAL)

e.g. 37 Jaden Mountain, apr. 2



Findings best practices

Use Summary Boxes

- Inform the user about correct input using **Summary Boxes**

The form is a user registration interface. It features a profile picture of a woman, followed by 'Upload' and 'Remove' buttons. The name fields are labeled 'First Name' and 'Last Name'. The password fields are labeled 'Password' and have a strength indicator (dots) and an information icon. The position field is labeled 'Position'. A 'Save & Continue' button is at the bottom. A summary box on the right lists requirements and samples for the password.



First Name
Julie

Last Name
Jacobs

Password
●●●●●●

Password

Position
Sales Manager

Upload  

Remove

Save & Continue

Requirements

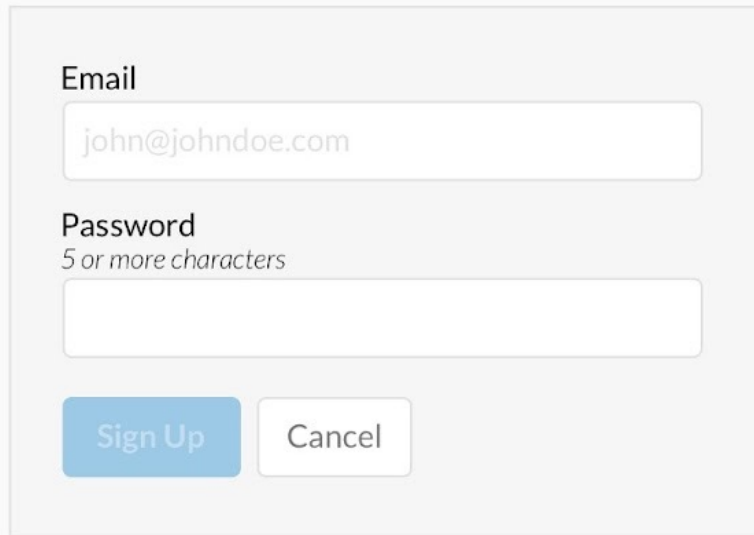
- ✓ Minimum of 6 characters
- ✓ Contains an uppercase letter
- Contains a number (0-9)
- Contains speacial characters (!@#\$\$%^&*)

Samples

Fkq@*B17Hm@yQD
Rb!1&Y5\$wHh4kN

Findings best practices

Don't hide basic helper text

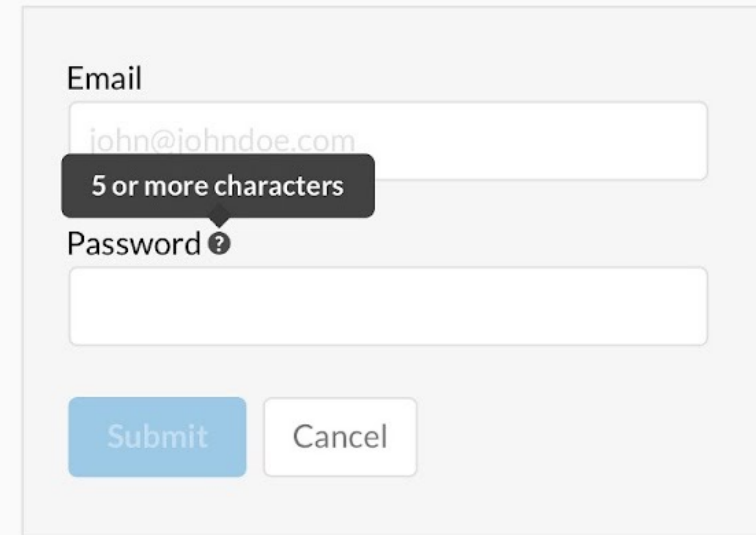


Email

Password

5 or more characters

Do



Email

5 or more characters

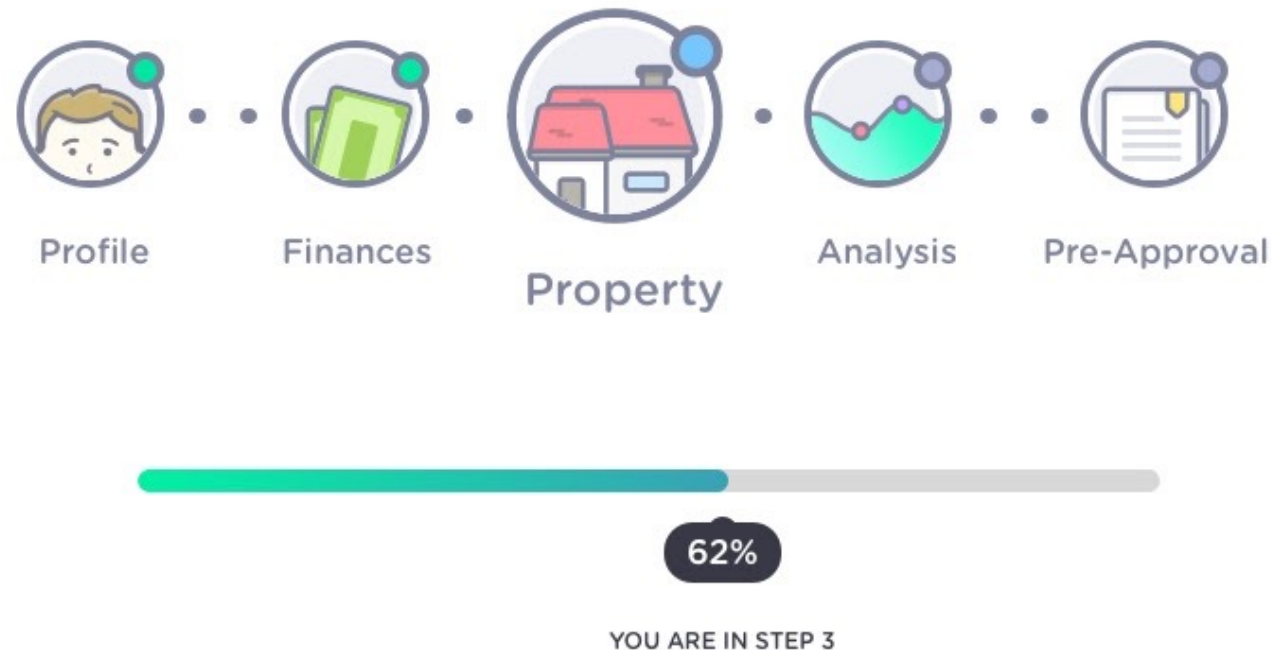
Password ?

Don't

Findings best practices

Use a detailed progress bar

- The closer respondents feel to their goal, the more likely they are to push themselves towards it. Indicate how many pages or steps they have left to complete. **90% of users** (by Clutch in 2018) **prefer forms** that use **progress bars** to **manage** their **expectations** about **completion time**.



Findings best practices

Checklist

- For **very long forms**, use a **table of contents-style checklist** So that the user knows what step they're on and can easily refer back to other sections.

- About this request
- ✓ Organisation Details
- ✓ Administration
- ✓ Cultural Responsibility
- **Staffing**
- Finances
- Governance
- Health and Safety
- Quality
- Service Delivery
- Summary & Submit

Staffing

1. Recruitment and Vetting Policies

Upload your organisation's staff recruitment and vetting policies.



Drag & Drop your files or [Browse](#)

Attach a previously uploaded document | v

2. Staff Induction Policies

How does your organisation ensure that new staff are properly set up in their new workplace?
Upload any relevant documents.



Findings from UK.gov*

Research leading to “task list pattern”

- Different types of applications involve different sets of tasks. From those that can be completed quickly, in one sitting, to those that require supporting documents to be prepared over a period of weeks or even months.

Researchers identified the following group of common user needs:

1. Users want to know what **tasks** a transaction involves **at-a-glance**
2. Users want to know **what order to do tasks** in, if any
3. Users want to **plan time** to do each task
4. Users want to know **which tasks are done and what tasks are left** to do

Findings from UK.gov

Research leading to “task list pattern”

- They made ‘read declaration’ one of the first tasks you do. At the moment, reading and agreeing to a declaration is one of the last things a user does. However, they found users wanted to know these rules upfront, as they might affect the decision to do something in the first place.

If using a task list page, we need need to:

- group related actions into tasks
- show the status of the tasks
- If there are lots of tasks to complete, we might need to group them into sub-sections.

Research Findings

Findings from UK.gov*

Research leading to “task list pattern”

- Include a **summary** above the task list to say how many **tasks** or sections have been **completed**.
- Make it clear to users which **tasks** they’ve completed, and which still need their attention, by **labelling** them **with tags**.
- Enabling users to **save and return** to the service at a more convenient time and reduce users' cognitive load by splitting up task lists into **sections**.
- If users are unsure what order to do tasks in (and if tasks can be done simultaneously), **organize tasks** into prioritized, **numbered groups**.

*Research by UK.gov

Service name goes here

Application incomplete

You have completed 3 of 8 sections.

1. Check before you start

Check eligibility	COMPLETED
Read declaration	COMPLETED

2. Prepare application

Company information	COMPLETED
Your contact details	IN PROGRESS
List convictions	NOT STARTED
Provide financial evidence	CANNOT START YET
Give medical information	CANNOT START YET

3. Apply

Submit and pay	CANNOT START YET
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Recommendations

- With an **average of 12.8 conditions** (normal claims and BDD claims combined (50% of service members filing for a BDD claim, listed 18 conditions or more)), Form 526 is a **very long form**. Best practices and comparison with UK.gov suggests that we should use a table of contents-style checklist, such as a **task list approach**.
 - Set clear **expectations** for completing Form 526, with as much **context** as possible, including **time estimate, documents** needed and details about **data privacy/security**.
 - Break up the form into **numbered, logical sections**, with the easiest questions first.
 - Show a quick **summary** of how many **tasks** are **completed** and how many are remaining.
 - Show current, previous and reminding steps/tasks (**as a task list** or table of content) and allow users to easily **refer/skip to** any of the **steps/tasks**.

Next steps

Discovery into how a task list approach could work for Form 526

- How can Form 526 be organized into **sections** and **tasks**?
 - How can the questions / tasks in the form be **numbered** logically?
- How can the questions best be presented to promote the **streak effect**?
- What **information and context** do users need **upfront** to reduce form abandonment?
- Can we use a **milestone submissions approach** in Form 526?
 - Initially only ask for the **information** that is **absolutely necessary** to submit a claim. Allow users to complement details later.

Questions?

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