

VA



U.S. Department
of Veterans Affairs

VA Mobile App: Personalization User Research Review

Summary of insight themes related to personalization from existing VA research

Executive summary:

Insight themes: Veteran motivations, behaviors & pain points

- Navigating the system & staying informed:
 - Veterans want to **understand their benefits and how to access them, what VA is doing, and what VA needs from them**, but have trouble doing that **on their own**.
- Seeking a sense of security in a complex system they don't always trust:
 - **Veterans are the glue** holding together **disparate pieces of a large and confusing system** that **they can't always rely on** to deliver the benefits they've earned.
- Communication & connecting:
 - Veterans value empathy and **communication** (especially **one-on-one connections**) **when navigating the VA**.

Executive summary (cont.):

Insight themes: Home screen

- Veterans want their experience to be **task-based (actionable!), streamlined**, and expect a **mix of links and widgets to complete tasks** from their home screen.
 - They want to be able to **quickly see what needs to be done**, act on it and get off the [site].
- Veterans want their experience to be **tailored to them**: a “**digital version of themselves.**”
 - **Features vary in importance** to Veterans depending on their **circumstances**.
 - Veterans want to **see benefits they may be eligible for** and benefits they **are unaware of**.
 - Some Veterans are interested in being able to **customize their homepage**.
- **Veterans prefer clear, simple design** (an easy to scan list of top tasks) in order to **avoid info overload**.

Executive summary (cont.):

Insights: Notifications

- The word “notification” gets used in studies and by Veterans to mean both “alerts” in general and something more specific:
 - **‘Notifications’** (something that the Veteran needs to *know*) **are different than ‘action items’** (something that the Veteran needs to *do*).
- Some Veterans expect a **centralized alerts page**, others expect to see notifications and updates at the **top of their home page** when logged into MyVA.
- **Time-sensitivity and unexpected problems should be prioritized**, but importance of an individual alert depends what is happening in a Veteran's life.
- The best notifications are **succinct** (brief and action-oriented), **personal** (applies to me and my life), **reassuring** (the things I set up to happen on a recurring schedule are happening), and **timely** (shows up when I need the information).
- Participants want **consistent information** in notifications across all channels.

Background

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Goal:

Identify research insights from existing VA studies to help inform our approach to **personalization** in the VA mobile app.

Approach:

We conducted a review of existing Benefits & Health-related VA research reports (2016-present) prepared by both internal teams (VA Mobile team + VA.gov teams) and external consultants (Frog, Harvard students), including:

- 8 reports focused on Benefits and/or VA.gov
- 4 reports focused on Health and/or MHV

Things we looked for

1. Veteran motivations and behaviors
2. Veteran pain points
3. Home screen related insights
4. Notifications related insights

Top level insight themes

Top level insight themes

1. Navigating the system & staying informed
2. Seeking a sense of security in a complex system they don't always trust
3. Communication & connecting

Navigating the system & staying informed

Insight:

Veterans want to **understand their benefits and how to access them**, what **VA is doing**, and what VA **needs from them**, but have trouble doing that on their own.

Navigating the system & staying informed (cont.)

Motivation:

Veterans want **ongoing guidance** after separating from service so they can continually **learn about what benefits are available to them** and **how to apply** on their own terms.¹

Navigating the system & staying informed (cont.)

Pain points:

- Navigating the VA ecosystem is **so complex and confusing** that **Veterans feel discouraged** to apply for, manage, and maximize their benefits.^{1,2}
 - A lack of ongoing benefits training leaves **Veterans at a loss for what they're eligible for** and **how to get started** with benefits.^{1,2,3,4}
 - Often Veterans have a hard time finding the right information—they **don't know the right VA terminology or questions to ask**.^{2,3}
 - Veterans **spend a lot of time searching for things online** because they don't know the right VA terminology.^{2,3}

Navigating the system & staying informed (cont.)

Pain points (cont.):

- For many, interacting with the VA benefits system **involves dealing with uncomfortable feelings:**
 - The VA benefits process makes Veterans **feel vulnerable**, which goes **against military conditioning**.^{1,2}
 - Many participants had to **overcome shame in order to identify that they were deserving of VA benefits**.³

Navigating the system & staying informed (cont.)

Behaviors:

- Veterans **resort to relying on in-person services** to access benefits.¹
- Veterans **rely on their peers, friends and family for guidance** in navigating the benefits process.³
 - Veterans use **social media and online communities** to keep in touch with others going through the process, to **learn about shortcuts** or alternative ways of getting things done, and to receive **updates**.³
- Participants with cognitive disabilities **removed themselves from the benefits process** out of frustration.¹

Navigating the system & staying informed (cont.)

Motivation:

Veterans **care about anything they have in flight**, whether that is education or other benefits.^{1,2,3}

- They **want to know where they are in the claims process.**²
- They want to know **what's going on** now, **how long it will take**, and what **happens next.**²

Navigating the system & staying informed (cont.)

Pain points:

- **Veterans feel ‘in the dark’** during their benefits journey.
 - They don't know **what VA is doing**, or **what VA needs from them**.¹
 - From application to decision, **they don't understand the claim** timeline, **their progress**, or what decisions mean.¹
 - **Veterans don't know how to get help, and finding the right person** at VA can be **complicated and confusing**.^{1,2}
 - i. When Veterans have questions throughout the benefits claims process, there is **no guidance from VA as to where they can receive help beyond the 1-800 number**.^{1,2}

Navigating the system & staying informed (cont.)

Behaviors:

- Veterans **check the status of their benefits claims frequently** and through multiple channels in the **hope that they can find better or more up-to-date information.**¹
- Veterans **often call VA or VSO staff or visit in person to get the detail they want,** as typically the call-center representatives can't access that information.¹

Seeking a sense of security

Insight:

Veterans are the glue holding together disparate pieces of a large and confusing system that they **can't always rely on** to deliver the benefits they've earned.

Seeking a sense of security (cont.)

Motivation:

Veterans want to feel like they're in control [of any process], but the VA **benefits process is siloed** and makes Veterans feel like they're **not in control**.¹

Seeking a sense of security (cont.)

Pain points & behaviors:

- Because of the **the fragmented experience** across VA (and between MHV, eBenefits, and VA.gov), Veterans have to **connect the dots between pieces** of the **system on their own.**^{1,2}
 - Veterans **manage their personal information** alongside financial information, medical records and notes, documents from their time in service and documents from VA, **across many online systems and through ad-hoc analogue processes.**³
 - They often have to **retell their story and are** constantly **filling out the same paperwork.**^{1,2}
- **Veterans don't trust the accuracy of the claim status** they see on eBenefits.³
 - Veterans **often call VA or VSO staff or visit in person to get the detail they want**, as typically the call-center representatives can't access that information.³

Seeking a sense of security (cont.)

Motivation:

Veterans are **concerned with documenting their service connected disabilities for fear of losing access to care** & think of their health record as a crucial component of their disability benefits.^{1,2}

Seeking a sense of security (cont.)

Pain point:

- **Veterans don't trust VA to safeguard their personal documents** for posterity and are concerned with documenting their service connected disabilities for **fear of losing access to care.**^{1,2}

Behaviors:

- **Veterans** store important files themselves ("**Document and store everything'** is the mantra of Veterans who have filed disability claims').^{1,2}

Connecting & communication

Insight:

Veterans value **empathy** and **communication** (especially **one-on-one connections**) when navigating the VA.

Connecting & communication (cont.)

Motivation:

Veterans **trust and want to connect one-on-one with individuals** who **know the details of their specific case** to help them.^{1,2}

Connecting & communication (cont.)

Behaviors:

- They **want to talk with VSOs, Claims Staff**, and other **VA service providers** when they have questions or need help.¹
- They seek out **in-person discussions** about their case **to get questions answered** (more quickly and thoroughly than online).¹
- Veterans also **rely on their peers, friends and family for guidance** in navigating the benefits process.²

Connecting & communication (cont.)

Motivation:

In addition to getting quality health services, **participants want to feel heard by their providers**, and they **want proactive and timely communication** from the VA about their health needs.^{1,2}

Behavior:

Veterans **use secure messaging when contacting health care providers** because they know that providers are required by law to respond within a set amount of time.³

Connecting & communication (cont.)

Motivation:

Veterans want to **feel heard** and to **give feedback**.¹

Pain point:

Veterans want to **feel heard, but often don't. Veterans are rarely asked for feedback during the claims process**.¹

Home screen related insights

Top level home screen insights:

1. **Veterans want their experience to be tailored to them**—a “digital version of themselves.”
2. **Veterans want their experience to be task-based (actionable!),** streamlined, and expect a mix of links and widgets to complete tasks from their home screen.
3. **Veterans prefer clear, simple design** (an easy to scan list of top tasks, approach to presenting health info) in order to **avoid info overload.**

What Veterans want from a home screen

Insight:

Veterans want their experience to be tailored to them—a “digital version of themselves.”¹

- **Veterans care about anything they have in flight**, whether that is education or other benefits.^{1,2,3}
- Veterans **want to see benefits they may be eligible for** and benefits that they are unaware of.^{1,3}
- **Features vary in importance to Veterans depending on their circumstances** or life stage and they expect their personalized screen to reflect that.²
- Some Veterans are interested in **being able to customize** their logged-in homepage (although this is less common as of late).^{1,2,4}

What Veterans want from a home screen (cont.)

Insight:

Veterans want their experience to be task-based (actionable!), streamlined, and expect a mix of links and widgets to complete tasks from their home screen.^{1,2,3,4,5}

- Veterans **value** a system that **allows them to manage their claims and documents** to the best of their ability. This management includes **timely notifications, shortcuts to streamline frequent tasks**, and **secure messaging** to receive answers on demand.⁵
- Participants would prefer **VA communications** that are **timely**, give a **clear sense of what to expect and when**.⁶
- They want to **be able to quickly see what needs to be done, act on it and get off [the site]**.⁷

What Veterans want from a home screen (cont.)

Insight:

Veterans prefer clear, simple design (an easy to scan list of top tasks, approach to presenting health info) in order to **avoid info overload**.^{1,2,3}

Notifications related insights

Top level notifications insights:

1. The word “**notification**” gets used in studies and by Veterans to mean both “alerts” in general and something more specific:
 - a. ‘**Notifications**’ (something that the Veteran needs to *know*) **are different than ‘action items’** (something that the Veteran needs to *do*).
2. Some Veterans expect a **centralized alerts page**, others expect to see notifications and updates at the **top of their home page** when logged into MyVA.
3. **Time-sensitivity and unexpected problems should be prioritized**, but importance of an individual alert depends what is happening in a Veteran's life.
4. The best notifications are **succinct** (brief and action-oriented), **personal** (applies to me and my life), **reassuring** (the things I set up to happen on a recurring schedule are happening), and **timely** (shows up when I need the information).
5. Participants want **consistent information** in notifications across all channels.

How Veterans think about notifications

These findings are based on existing research conducted on the MHV, MyVA, and VSA websites (not the mobile app).

1. The word “**notification**” gets used in studies and by Veterans to mean both “alerts” in general and something more specific:
 - **‘Notifications’ are different than action items:**
 - In one study, Veterans made a clear **distinction** between an **'action item'** (something that the Veteran needs to DO) and a **'notification'** (something that the Veteran should KNOW). They want to be able to quickly see what needs to be done, act on it and get off the site.
 - ‘Notifications’ is also used throughout other studies to describe any kind of alert.
2. Veterans **expectations around where Notifications should live varied** between studies.
 - Some users expect to have a **centralized alerts page** (VSA authenticated experience).
 - Some users expected to see notifications and updates at the **top of their homepage** when logged into MyVA.

How Veterans think about notifications (cont.)

3. Veterans expect specific attributes of notification content and have expectations about their order of prioritization.

- **Prioritization/order of notifications:**
 - **Time-sensitivity and unexpected problems** should be prioritized. (if something is going to expire, or if something is time-sensitive they would want that to be called out in some way that they can't miss)
 - **Importance of an individual alert depends** what is happening in a Veteran's life.
- Notification **content:**
 - The **best notifications** are **succinct** (brief and action-oriented), **personal** (applies to me and my life), **reassuring** (the things I set up to happen on a recurring schedule are happening), and **timely** (shows up when I need the information).
 - Participants want consistent information across all channels.

How Veterans think about notifications (cont.)

- Notification topics mentioned by Veterans (*mentioned more than once):
 - **Health:**
 - Appointments*, Prescription refills*, Messages*, Physician referral approvals
 - **Money:**
 - that they owe, or are owed*
 - **Benefits:**
 - Claim status**, Education, benefits that Veterans are entitled to, Home loan info
 - **General:**
 - Approaching deadlines (e.g. 3 days left to provide document), Changes to VA benefits or policies that impact them, Veteran organizations available to join

Questions about this work?

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Appendix

Appendix

Sources:

1. [VSA Authenticated Experience: Action Items \(aka Notifications\) Discovery Research \(Internal VA, Sep 2021\)](#)
2. [Veteran health experience and patient portal research \(Internal VA, March 2021\)](#)
3. [Digital Health Modernization Generative Research Study 1 #6 \(Internal VA, Dec 2020\)](#)
4. [Logged-in homepage: Discovery summary \(Internal VA, June 2020\)](#)
5. [Harvard-VA Executive Presentation - Meeting veterans where they are: their smartphones \(Harvard Students, May 2020\)](#)
6. [Dashboard 2.0 User Interviews Research Summary \(Internal VA, Dec 2019\)](#)
7. [Personalization 2.0 Discovery: Summary and Strategy \(Internal VA, June 2019\)](#)
8. [VA.gov User Notifications MVP Readout - end of sprint demo \(Internal VA, 2018\)](#)
9. [Benefit planning, applications, and claims research - VCRD D5 Research Readout \(Frog, March 2016\)](#)

More detail on the findings, with specific study references by insight: [Review of User Research: VA App Personalization](#).