

VETERAN FACING SERVICES – DIGITAL HEALTH MODERNIZATION

# 1095-B Initial Research Discovery

04 February 2022

# Agenda

- 01 We heard you
- 02 User flow & wayfinding considerations
- 03 Medium fidelity landing page
- 04 Next steps

1095-B DESIGN REVIEW

# We heard you

# From Tuesday, Feb 2

Comments	Stakeholder	Design team comments
<b>User flow:</b> Can we proof out VA letters?	Tracey Mulrooney	Further proofing to be discussed today
<b>User flow:</b> If under Health care / Manage resources, would it live on the Affordable Care Act page?	Tracey Mulrooney	Further proofing to be discussed today
<b>User flow:</b> How far in the navigation should this be nestled and why?	Tracey Mulrooney	Further proofing to be discussed today
<b>Comparative:</b> The label “Tax forms” is really clear. Are there other tax documents that could warrant a wholistic section?	Tracey Mulrooney	Confirmed via Tracey, there are no other tax forms a Veteran would receive at this time. This is a one-off use case.
<b>Low fidelity sketch:</b> Make contact info relevant to the form since general VA contact info is in the footer	Tracey Mulrooney	Done
<b>Notifications:</b> Since a 1095-B isn’t needed when submitting taxes, it would be confusing to give it too much prominence—especially on the homepage	Tracey Mulrooney	Noted
<b>Research:</b> For the first session, prioritize the landing page, secondarily, the wayfinding	Tracey Mulrooney	Noted priorities; we will conduct the sessions with those considerations. Given the content we should have time to address both areas and would like the opportunity to validate both needs, twice.

# Informed, focused design

As takeaways, we identified three areas of focus for this project:

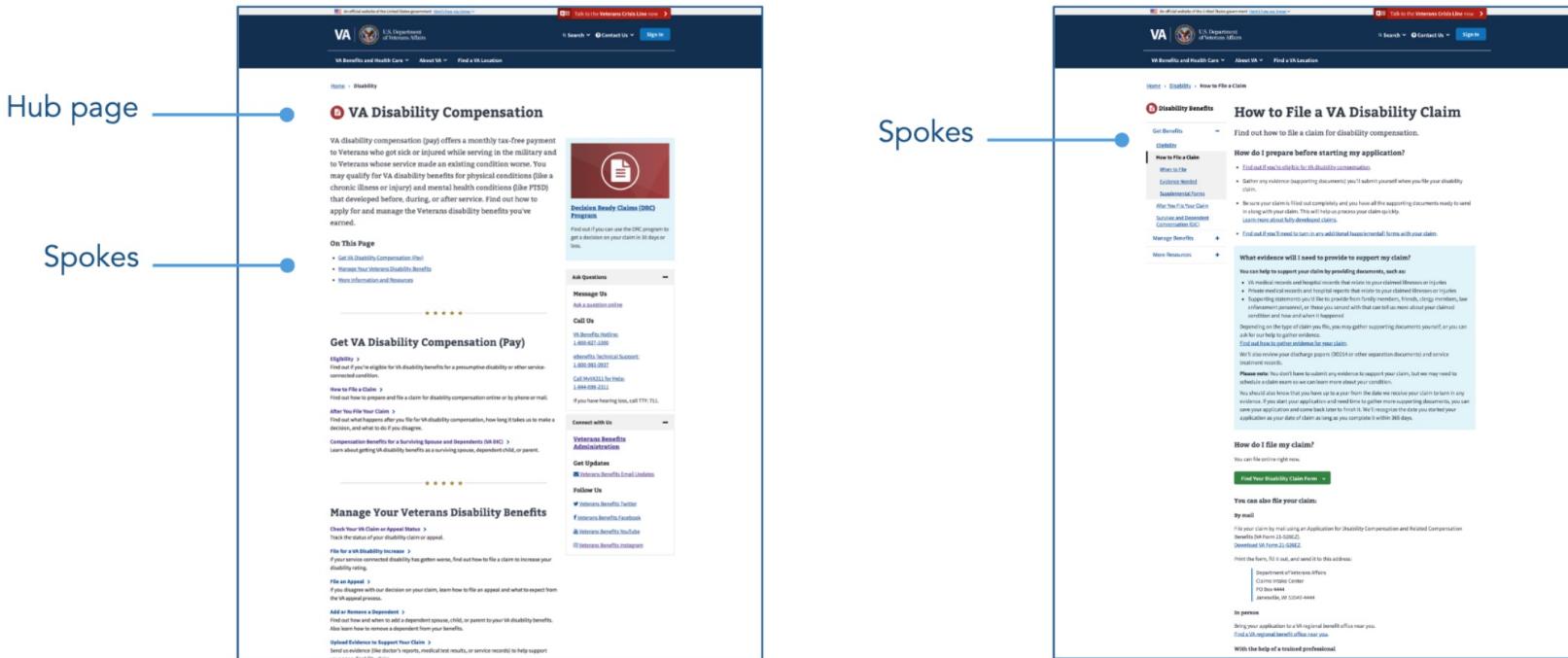
- **Seamless User Experience** – the form should be easily findable through the navigation, leveraging plain language, and redirected to it through relevant crosslinks.
- **Authenticated & Unauthenticated Experiences** – an unauthenticated experience, as well as personalized content through an authenticated experience, sets user expectation that there is relevant information available upon logging in, but also helps surface FAQs earlier in their journey.
- **Knowledge Base & Escalation Path** – anticipate user issues and questions by providing contextual help and a clear path to escalate technical issues or form errors.

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# User flow

# Current VA.gov IA structure

We cross-referenced the documentation around the current hub and spoke navigation. This is an effective navigation model when sites are often task based, and when users tend to visit only one hub during their session.



## 6. THE NEW VA.GOV GLOBAL INFORMATION ARCHITECTURE

### A hub-and-spoke content model with single entry points into content and tools

#### New benefit hubs

- 9 benefit hubs with 18 content spokes
- 275 pages of plain-language benefits content
- 25 benefit tools landing pages

#### New global navigation

- 9 benefit mega menus
- 1 non-benefit mega menu

#### New global utilities

- Personalized user account homepage and profile
- Account navigation
- Sign in/create account with identity proofing
- Search
- Contact us
- Veterans Crisis Line
- Find a VA location

# 1095-B User flow, Health care path

## Why this could work:

- This tax document is health care specific, has a natural fit in the health benefit hub, and is directly associated the Affordable Care Act
- Leverages the established hub and spoke navigation model

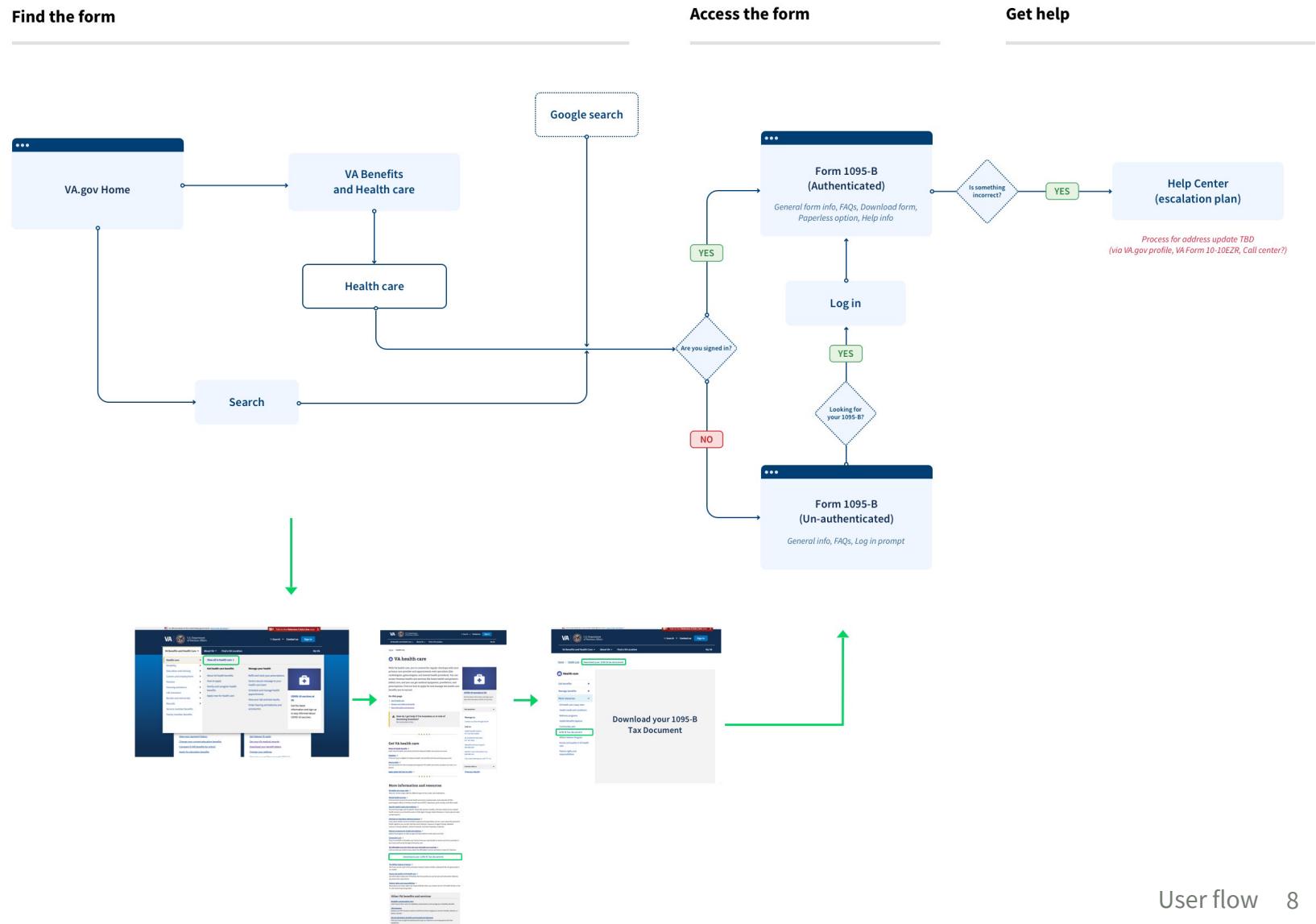
## Risks:

- Users may initially look for this document via the Records hub

## How we can mitigate these risks:

- Leverage a quick link in the health care megamenu during tax season
- Cross link from Records section and VA forms

Further insights to be brought forward after the first round of user testing.



# 1095-B User flow, Records / VA letters path

## Why this could work:

- This tax document is a result of having a VA benefit (health care)

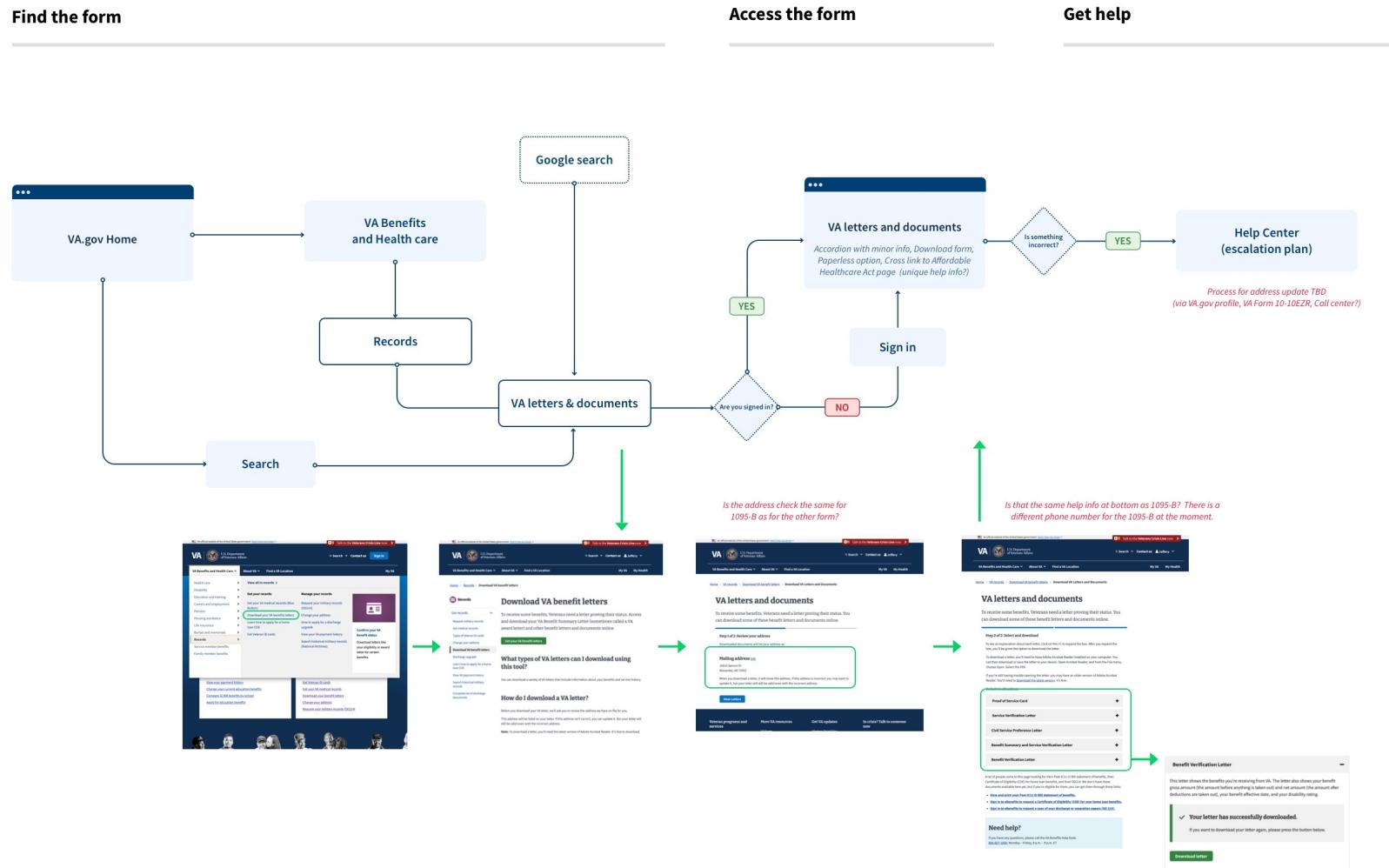
## Risks:

- Download VA letters is the primary nav/link label and users might be looking for the term 'document'
- The address displayed in the Download flow might not be the same as the 1095-B address (benefit system vs enrollment system)
- Different help info for the 1095-B (e.g., phone number)
- Does not allow for unauthenticated landing page unique to 1095-B

## How we can mitigate these risks:

- Leverage the Affordable Care Act page to explain more about the 1095-B and crosslink to Download VA letters & documents

Further insights to be brought forward after the first round of user testing.



# 1095-B User flow, Records path

## Why this could work:

- This tax document is a *record* (proof) of your health care benefit

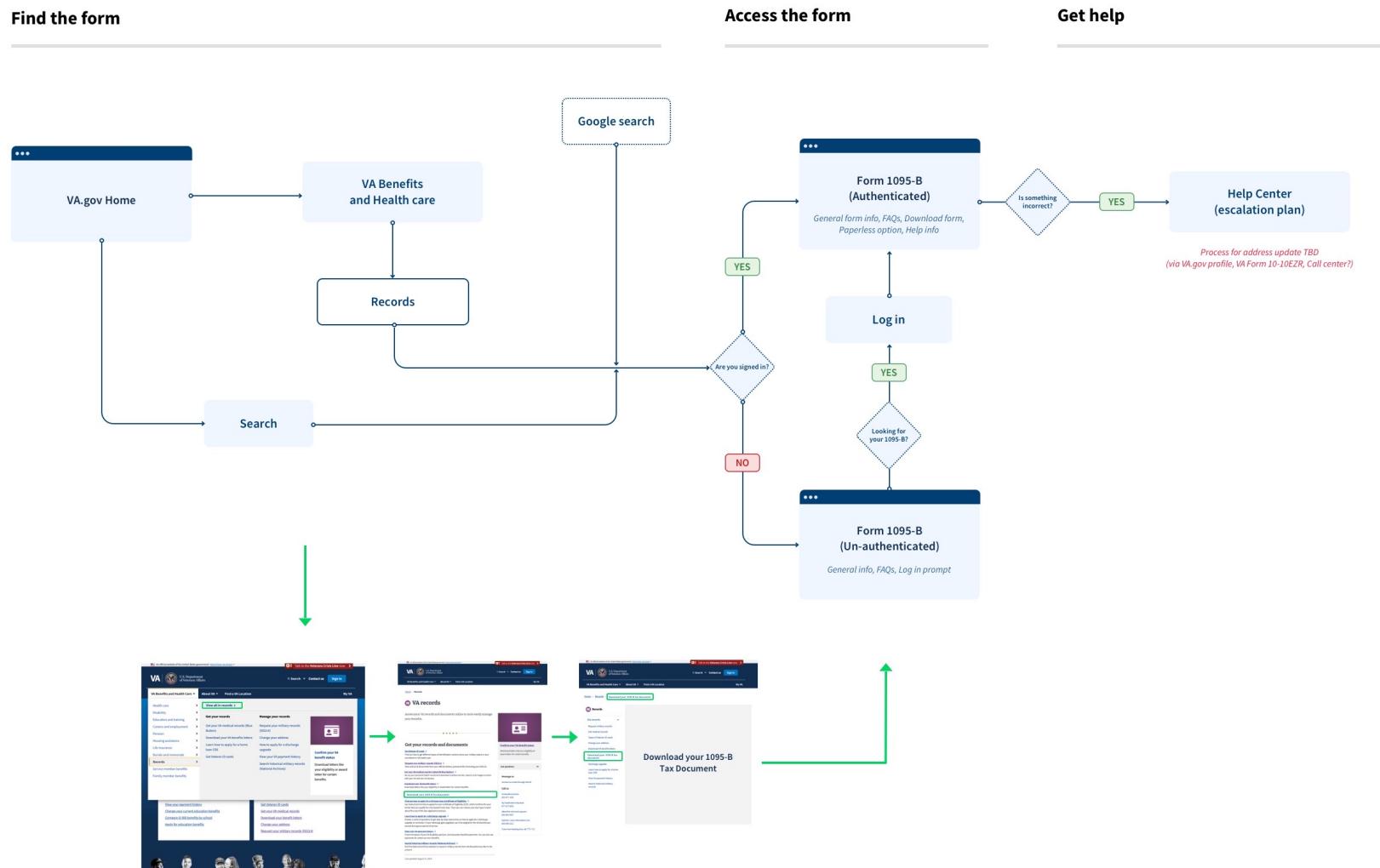
## Risks:

- Users may first enter the health care benefit hub given that the 1095-B is related to the VA health benefit (Health care is also the first hub listed in the navigation)

## How we can mitigate these risks:

- Crosslink to the tax document via the Affordable Care Act page

Further insights to be brought forward after the first round of user testing.



# For reference, other paths we considered



## Find a VA form

Search for a VA form by keyword, form name, or form number.

## Frequently used VA forms

You can now do many form-based tasks online, like filing a disability claim and applying for the GI Bill or VA health care. We'll walk you through the process step-by-step.

- |  |  |   |
|--|--|---|
| File a VA disability claim<br><small>Equal to VA Form 21-526EZ</small> | Apply for the GI Bill and other education benefits<br><small>Includes VA Forms 22-1990 and 22-1995</small> | Apply for VA health care<br><small>Equal to VA Form 10-10EZ</small> |
|--|--|---|
- [Learn how to apply online >](#)

Manage your VA benefits and other information



## My VA

Go to your profile

### Claims and appeals

You have no claims or appeals updates in the last 30 days.

- Check your claim or appeal status

### Apply for VA benefits

What benefits does VA offer? >

Applications in progress

You have no applications in progress.

Explore VA benefits and health care

Health care

Disability compensation

Education and training



## Get your VA medical records online

Our online tools can help you review, organize, and share your VA medical records and personal health information. Find out if you're eligible and how to sign in to start using these tools.

On this page:

- VA Blue Button
- The Veterans Health Information Exchange (VHIE)

### VA Blue Button

My HealtcheVet will open in a new tab where you can view your VA medical records.

You may need to sign in again on My HealtcheVet to use the VA Blue Button tool. If you already signed in with the same account you used to sign in here on VA.gov, you also may need to disable your browser's pop-up blocker so that My HealtcheVet will be able to open.

[Go to My HealtcheVet](#)

What is VA Blue Button, and how can it help me manage my health care?

VA Blue Button is a feature of the My HealtcheVet health management portal. It lets you review, print, save, download, and share information from your VA medical record and personal health record. With this tool,

## Path: VA Forms

- Currently this is for all forms that a Veteran can download and fill out (not pre-filled documents)
- Opportunity to provide a link or prompt for users if they try to search for the 1095-B document

## Path: My VA / My health

- No clear placement (currently 'application' focused or health portal link)
- No clear path to unauthenticated 1095-B content and doesn't allow for a clear navigational path

## Path: VA Blue Button

- Health portal focused on health care data
- No clear path to unauthenticated 1095-B content and doesn't allow for a clear navigational path

## Path: Tax Document hub

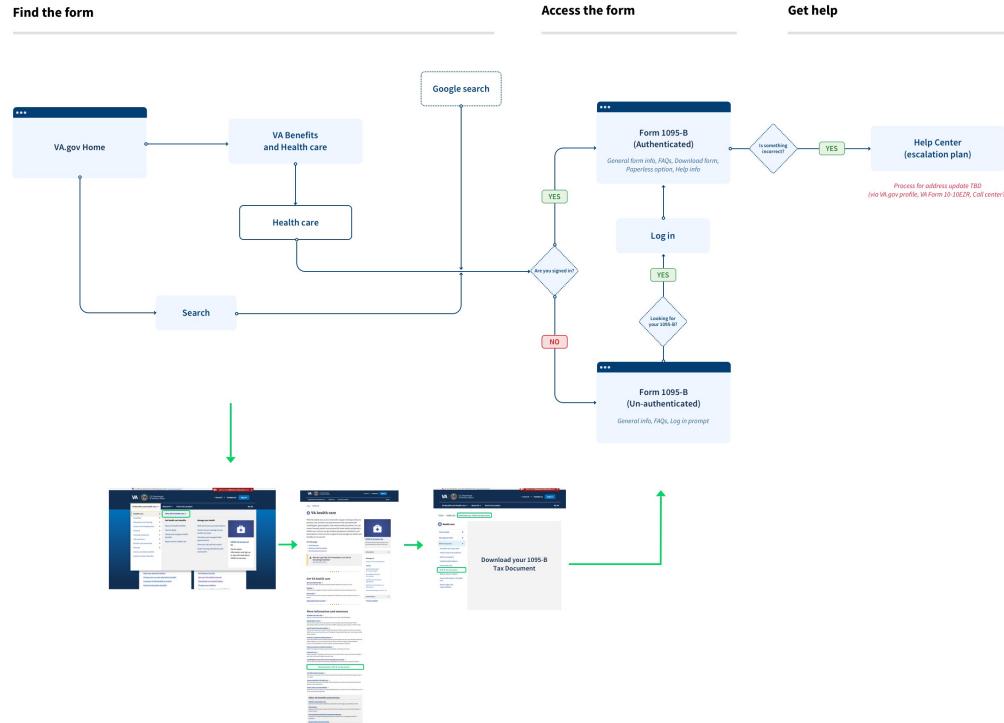
- Not enough content to fulfill the hub and spoke navigation model, there are no other tax forms that Veterans receive regarding their benefits at this time
- Alternate options provide the same speed to access for the task without larger global nav considerations
- Gives hierarchical prominence to the 1095-B, the only tax form that a veteran doesn't need to do anything with and is only relevant for reference during a tax season

# Our recommendation for testing

See full user flows [here](#)

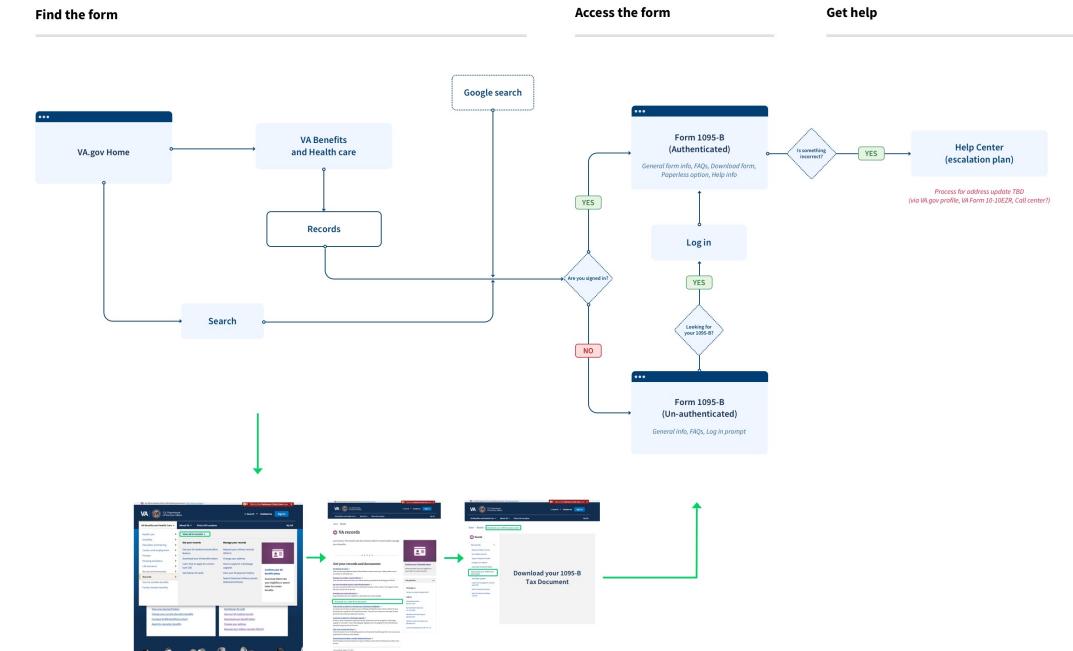
## 1. 1095-B User flow, Health care path

This documents the happy path user flow (not shown: crosslink where relevant e.g., via Records, or VA forms)



## 2. 1095-B User flow, Records path

This documents the happy path user flow (not shown: crosslink where relevant e.g., via Health care, or VA forms)

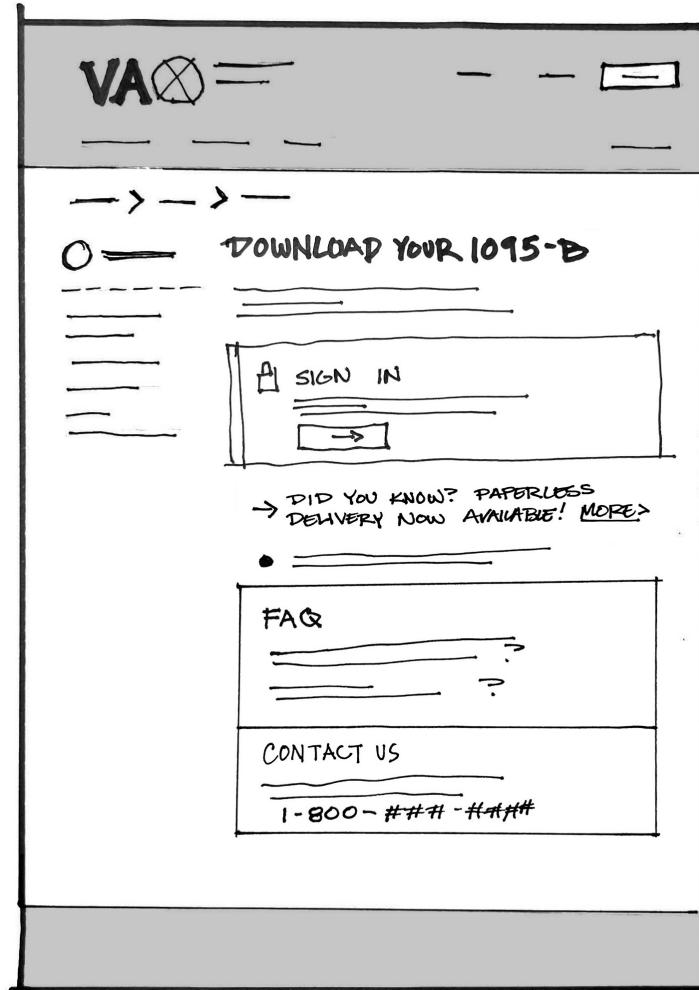


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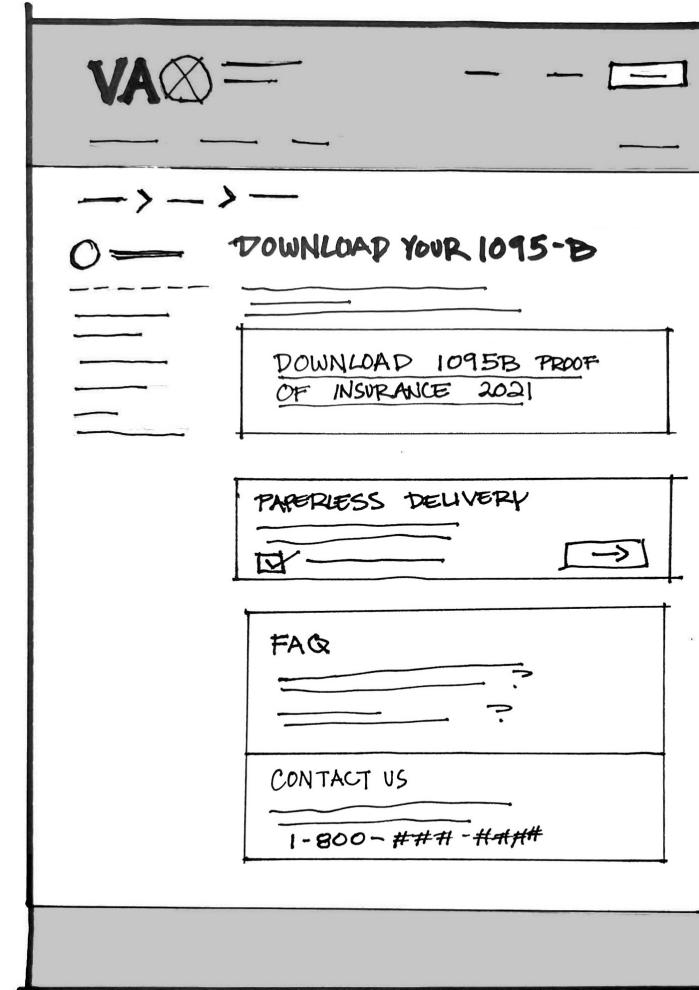
# Landing page 1095-B

# Concept sketches from Tuesday

Unauthenticated (default)



Authenticated



[Sketch File Here](#)

# Medium fidelity designs

## Unauthenticated (default)

The screenshot shows the VA website's unauthenticated version. The main heading is "Download your 1095-B tax document (proof of health coverage)". Below it is a detailed description of what the 1095-B is and how to use it. There are two main download options: "Please sign in to download your 1095-B tax document" and "Get paperless delivery". A note at the bottom states that users can view their 1095-B after download using Adobe Acrobat Reader. At the very bottom, there is a "More Information" section about the Affordable Care Act.

## Authenticated

The screenshot shows the VA website's authenticated version. The layout is identical to the unauthenticated version, featuring the same heading, description, and download options. The "Get paperless delivery" section includes a checkbox for "I would no longer like to receive this document by mail. I have read the terms and conditions to consent to my 1095-B electronically." The "More Information" section at the bottom also remains the same.

[PDF Here](#)  
[Sketch File Here](#)

1095-B DESIGN REVIEW

# Next steps

# Next steps

- Iterate on our discussion today
- Ready content for Design Intent Sync (Monday, Feb 7, 3:30pm ET)
- Submit Research Plan and schedule a sync with the Research team, goal to begin user testing Friday, Feb 11
- Incorporate additional findings from Tech Discovery
- Outline additional crosslink needs for users and iterate on copy