# VA.gov CMS: Facilities Usability Testing, Round 1

**Moderator Guide**

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| Project Name: | Facilities Usability Testing, Round 1 |
| Date: | Feb. 20-27, 2019 |
| Plan: | [Research Plan (gDoc)](https://docs.google.com/document/d/1_OV_SqMIk4jYvFEm-n8K6E7yyiPa2XWZCgV4-BP7Oxs/edit?usp=sharing) |

## 

## Prototype questions

1. How do participants complete tasks using our prototype (versus what exists today on va.gov)?
2. **Navigation:** How often do participants correctly access the new navigation to find what they are looking for?
   * How often do participants resort to a search function to find what they are looking for and what are their queries?
3. **IA and content hierarchy:** How does the **content organization** suit the way participants go about finding it (for example, can all content be co-located on the regional facilities page)?
   * How **quickly** do participants determine if the site content answers their questions when scanning the drafted labels, headings, copy, images, and other content?
   * How often are participants asking the facilitator for help?
4. **Online vs in person:** How realistic is it to expect Veterans and caregivers to use a facilities website in a **self-service manner** to connect to benefits and services when the in-person experience is as meaningful an entry point as it currently is?
   * Other notes:

Meta questions

1. How much does the new design in total suit their technology abilities and preferences?

## Set up

* Send the tester an email reminder with meeting link and consent form.
* Print this guide.
* Leave bias / baggage at the door. Get into active-listening mode.
* Turn on “Do Not Disturb” or mute notifications.
* Turn off “power save”/sleep mode on external devices, E.g. cameras
* Clear your desktop.
* Auto mute new attendees (So observers don’t disrupt).
* Turn off “chime for attendees joining/leaving.”

## Important Links

|  |  |
| --- | --- |
| Meeting Link: | Different for each session, see meeting invitations |
| Prototype Link: | https://projects.invisionapp.com/share/3SQIR0TZDNP |

## Interview Reminders

* Ask open-ended questions
  + DON’T ask multiple-choice questions
  + DON’T ask yes/no questions
* Ask broken questions
  + So what… is…
  + What do you expect to see next?
* Bring your curiosity
  + DON’T assume. Ask why!

## Reset Meeting

* Mute & stop your video (Stay dark and silent until you are ready to start.)
* Stop sharing.
* Stop recording.

## Participants

https://app.gotomeeting.com/?meetingId=PASTEIDHERE

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | **Day** | **Time** | **Name/Loc** | **Participant Details** | **Team** | **GTM ID** |
| P1 | 2/20 | 10AM | **David** G  DC | Male. 25-34 years old.  **Spouse** of Veteran.  **Army** | Jodi (interview)  Meghana (notes)  Eric (debrief) | **406-066-237** |
| P2 | 2/20 | 2PM | **Ronald** A  IN | Male. 75+ years old.  NOT enrolled in healthcare benefits  **Marine Corps.** | Jodi (interview)  Eric (notes, debrief) | **666-861-341** |
|  | 2/21 | 11AM | **Jessica** A  TX  (no-show) | Female.  **Family member** of Veteran.  **Airforce** | Jodi (interview)  Eric (notes)  Meghana (debrief) | **763-299-605** |
| P3 | 2/21 | 4PM | **Sheryl** N  TX | Female. 45-54  NOT enrolled in healthcare benefits  **Navy** | Meghana (interview)  Jodi (notes, debrief) | **925-085-053** |
| P4 | 2/22 | 11AM | **Joshua** L  IA | Male. 35-44  NOT enrolled in healthcare benefits  **Army** | Kennedy (Interview)  Howie (notes, debrief) | **675-968-701** |
|  | 2/22 | 1PM | **Jessica** G  AZ  (no-show) | Female. 45-54  Spouse of a veteran  **Army** | Kennedy (interview)  Kat (notes, debrief) | **492-199-645** |
| P5 | 2/22 | 4PM | **Sharman** W  WA | Female. 45-54  Navy | Eric (interview)  Jodi (notes)  Kennedy (debrief)  Howie (observer) | **393-188-789** |
| P6 | 2/25 | 8AM | **Andrew** F  VA | Male. 45-54  NOT enrolled in healthcare benefits  **Army** | Meghana (interview)  Jodi (notes)  Eric (debrief) | **881-154-869** |
|  | 2/25 | 1PM | **Pamela** W  MN  (no-show) | Female.  Veteran. **Army**. | Eric (interview)  Kat (notes)  Kennedy (debrief) | **315-873-941** |
|  | 2/26 | 8AM | **Elizabeth** K  UT  (no-show) | Female.  Spouse of Veteran. **Army**. | Meghana (interview)  Eric (notes)  Kennedy (debrief) | **383-025-229** |
| P7 | 2/26 | 11AM | **Daniel** S  VA | Male.  Family member of Veteran. **Army**.  Also a Veteran | Kennedy (interview)  Meghana (notes) | **868-575-229** |
| P8 | 2/26 | 4PM | **Roger** M.  MD | Male.  Active duty, **Navy**. | Eric (interview)  Kat (notes)  Kennedy (debrief) | **315-585-949** |
|  | 2/27 | 10AM | **Robin** B  VA  (tech issues) | Female.  NOT enrolled in healthcare benefits  Veteran. **Air force.** | Kennedy (interview)  Eric (notes)  Meghana (debrief) | **415-037-789** |
| P9 | 2/27 | 12PM | **Moon** S  MD | Transgender.  Family member of Veteran. **Navy.** | Kennedy (interview)  Eric (notes) | **812-925-693** |
| P10 | 2/27 | 2PM | **Holly** V  MD | Female.  Veteran. **Navy.** | Eric (interview)  Meghana (notes & debrief) | **333-540-957** |

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# Hello & Welcome (~5m)

#### Greeting

* Hi, I’m \_\_\_\_\_\_\_\_\_\_, calling on behalf of Department of Veterans Affairs and I also have some colleagues on the line observing and taking notes.
* This entire session should take about 45 minutes I want to be sure not to keep you much longer, so I may occasionally prompt you with the next question or topic.
* In this session, we want to hear your honest opinions. We are not testing your ability. We just want to improve these tools to better meet Veterans' needs.
* I will not be offended by any opinions you express, and I welcome your feedback.
* If for any reason and at any time you want to stop the session, please let me know. You will not be penalized in any way if we need to stop.

#### Reminders

* Let me walk through what we’re going to cover today.
  + We’ll start by asking you about your experience using VA.gov, **then we'll ask you to look at a mockup of the website VA.gov, which has some information we want to explore with you.**
  + First, I’d like to start by learning more about who you are and your experiences.
  + Then, I’m going to send you a link to a few ideas that I’d love your feedback on.
  + These might look like a real website, but not everything will work. They are essentially images you can click on. Feel free to scroll up and down, explore.
  + I’m going to be asking you what you think about these ideas, and I’d love for you to think out loud, and let me know what you think -- positive or negative.
* I did not design anything that you’ll see, I’m just collecting feedback. Nothing you say will hurt my feelings.
* Sometimes I may sound like I’m asking “why” a lot. That’s because I just want to make sure I’m understanding you fully.

#### Outline Purpose and Ask Permission

* We've asked you to join an online meeting so we can follow along with your screen movements, just for the duration of this interview. [brief pause]
* As part of that, I'll be asking you to be the presenter.
* I'm going to make you the presenter and you’ll see a prompt coming your way with an option that says “Share My Screen.”
* Before you click that, If there’s anything that you’d like to move around or hide because it’s confidential, go ahead and do that first.
* Great, now I see your screen on my end! Be sure not to close this window, as it will end the screen sharing session.
* **With your permission, I’d like to record the session, only for use in this study. Is that OK? Press record.**
* Any questions before we begin?

# The Interview (~40m)

## Getting to know you and build rapport (~10 mins)

1. To begin with, thank you for your service. When did you serve and which branch?
2. How often are you online? What do you do most?
3. Are you aware of various services that the VA offers to Veterans?
   * Are you interested in the types of benefits that the VA offers Veterans?
   * How do you seek information to learn more?
4. Are you enrolled in benefits provided by the VA? If yes/no, why?
5. Where is your (or your spouse’s) local VA medical center?
   * Have you visited?
   * If so, what is the nature of your visits there?
6. Have you been to any other veteran medical centers?
   * If yes, how do these centers compare?
7. Are you involved in any groups with other veterans?
   * If yes, which and why?
   * If no, why?

## Authentic Use (~6)

##### Existing VA.gov > do not direct the participant anywhere. See how they would do this task on their own.

* Imagine you have just moved to Pittsburgh and you need to go to an appointment at the Pittsburgh medical facility. (adapt the language to fit your participant’s language / context)
  + Could you show me how you might find information about where you need to go?

#### Pick a few follow-up questions (time permitting)

* What else do you need to know about getting into the Pittsburgh system?
* Did you find the information you expected to see? Why/why not?
* How would you describe how you started this task?
* How would you describe the amount of time you spent on this?
* At any point did you feel lost? What would have helped you get back on track?
* Would you look for something else while you’re here?

## Prototype (~20 mins)

##### Wayfinding / Design Patterns

1. I'm going to share a link with you now via the GoToMeeting chat: [**https://projects.invisionapp.com/share/3SQIR0TZDNP#/screens**](https://projects.invisionapp.com/share/3SQIR0TZDNP#/screens).
   * [Feel free to scroll up and down]
   * What do you notice on this page?
   * Is there anything you see here that **seems useful** to you?
     + Before you click on that, tell me what you expect to see if you click on that.
2. Thank you for sharing that. How have planned your (or your spouse's) visits to a VA medical center in the past?
   * Let’s imagine that you hear of a way to schedule a visit online. You're interested in trying this.
     + What do you notice here?
     + How would you go about scheduling a visit?
     + **[on Make an Appointment page]** 
       - What are you seeing here?
       - What information would help you make an appointment?
       - Did you find the information you expected to see?
       - Did finding a way way to schedule a visit online seem cumbersome or easy?
     + Would you look for something else while you’re here?
3. **[reset the prototype]** Imagine you have a Veteran friend who's moving to the Pittsburgh area. She is currently not enrolled in healthcare benefits but has decided to enroll. From here, is there a way for you to help her get into the system?
4. **[reset the prototype]**
   * You heard from a friend that there are some great deals at the tax-free Patriot Store (also known as a PA store) at the Heinz Medical Center. You want to get directions to the Patriot Store and see if there is nearby parking. How would you do this?
     + [Feel free to scroll up and down]
     + What are you seeing here?
     + What makes you feel like X?
     + What would you expect to see under “Parking”?
     + The second section is opened up right now. What do you think of that?
     + Accordions: Do you see this kind of design anywhere else online?
     + If it weren’t here, where would you expect to find it?

## Wrap-up (~5 min)

1. Did anything surprise you about what you saw today?
2. What one piece of advice do you have for the team so that a new site could help you find what you need?
3. How would you describe it to a friend?
   1. How would you describe it in 3 words?
4. Who do you think this is for? Who do you imagine would use it?
5. Did it make you feel any way in particular?

# Goodbye & Thank You (~1 min)

* Well [participant name] you’ve answered all of our questions. Do you have any questions for us?
* Your input will be very valuable to me and the team. We really appreciate your time and feedback. <briefly summarize a few of participants’ key points>
* Your contact from Peregian will follow up with you within 24 hours by email to send the compensation for your time.
* I’m now going to remove you as presenter, so I won’t be able to see your screen anymore. [Make yourself presenter in GoToMeeting]
* Now, I’m going to end the session.
* Thanks so much for participating, and have a great day!
* **[Dismiss participant in GoToMeeting] [STOP Sharing] [STOP recording!!] [STOP Your Video] [MUTE]**

# Appendix: If needed, set up in GoToMeeting

* Do you have your web browser handy?
* Okay when you’re ready I'm going to read you a URL to type in your browser so we can get started.
* Ready? It’s JoinGoToMeeting.com. The meeting ID is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* It’s going to install a small plug-in in your browser to coordinate our session today.
  + [if needed] It is a well known screen-sharing service that is totally secure and made by a Fortune 100 tech company (called Citrix). The plugin will un-install at the end of the session
* That’ll take a minute, let me know when it’s done…
  + [if needed: it may have downloaded onto your desktop or into your downloads folder. Would you look there for a folder called “Citrix Install” and click on that?]
* [after a few moments] Soon it will ask you for your name and email – just enter your first name, we don’t need your email address.
  + Make sure you can see the microphone icon in the GoToMeeting control panel. If not, ask them to click mic & speakers in the audio section of the panel.
* [once they’re in the session and you can hear them through the computer] I’m going to disconnect the call and join you on the meeting...