Purpose of this playbook:

* This is for Shelley and her team (prototype to be tested with them; when it’s iterated and improved upon, it can be used across all VA regional facilities)
* Introduce the principles that protect user experience (help them understand the “why” behind various guidelines and “why” the new tool)
* Explain to content managers at VA Pittsburgh which things have changed with the new CMS (and map their current processes to the new tool)
* Produce an evergreen guide that remains usable even in future iterations of the new site
* Give Shelley a tool she can use to enforce and protect the guidelines
* Andy L: “What is the governance structure from a UX standpoint for the facility product in order to protect the user experience?”

## Why this playbook

The primary goal of our website is to help Veterans, their loved ones, and their caregivers understand and access the benefits and services available to Veterans through VA Pittsburgh. Making an appointment or looking up services at our facilities should be as straightforward as making an online retail purchase or checking a bank account balance.

Our dedication to providing a smooth online experience for Veterans is aligned with the VA’s Digital Modernization Strategy, which includes content recommendations for prioritizing Veterans first, considering users’ context, and driving meaningful action. It also includes a strategic shift to promote self-serve digital tools, such as refilling prescriptions online, so patients can more effectively manage their health.<language about the new tool or technologies, etc>.

This playbook helps you put these big ideas to work at the regional health care system level, giving you a framework that you can apply to your everyday tasks and demonstrating how your VA health care website reflects the agency-wide VA efforts to improve the online Veteran experience. Whether you are a content manager, public affairs officer, clinician, or front-line staff member, this playbook can make the modernization transition easier for you while establishing long-term guidelines

* Understand who’s in charge
* Create new website content that
* <statement informed by user story>
* <statement informed by user story>

## Our principles

The following principles help us manage our VA.gov web content in a thoughtful way that considers the context of our users while incorporating modernized, VA-wide digital content and tools. All of our processes for content creation, approval, and publication should follow these principles, which are aligned with the VA’s Digital Modernization Strategy -- and with our primary goal of providing excellent service and care to Veterans.

1. Understand the Veteran’s patient journey.
2. Use words, design, and structure that are easy to understand.
3. Follow guidelines for content ownership and authority.
4. Maintain harmony between VA national, VA regional, and VA local content.
5. Understand the specific purpose and audience of your content.
6. Measure the impact of website content and use data to improve it.

### 1. Understand the Veteran’s patient journey.

To make sure our website meets the needs of Veterans, we put ourselves in their shoes when creating and organizing content. We think about how they arrived at our website, why they might be looking for care, and what blockers might challenge them in navigating our site or coming in person to our facilities. We serve Veterans from diverse backgrounds with a variety of needs. Understanding where they are in their journey through life allows us to better prepare them for their journey through our health care system, right down to finding parking or signing up for cooking classes.

**How to do it**

> Before creating any piece of content, think about the user goals related to the content. What action do you want the user to take after reading the content? Use short, clear descriptions and tell them what steps to take next.

> Provide the right amount of information to help the user achieve their goals. This can mean avoiding too much information (which distracts the user), or it can mean giving step-by-step instructions when applicable.

> Use Search Engine Optimization (SEO) to help support the needs of Veterans who arrive at our site through Google or other Internet search. <explain why>

> More TBD

**Key questions**

* How might a Veteran have arrived at the website (e.g., Google) and how will it change their experience if they enter the site on a page that is not Home?
* How will it change the Veteran’s next steps if they aren’t enrolled in VA health benefits yet?
* How will a Veteran’s background, socioeconomic status, and education level affect their behavior on the website and their ability to act on the information?
* What action do you want the user to take after reading a piece of content?

### 2. Use words, design, and structure that are easy to understand.

We use plain language and organize our website in a way that makes it easy for users to get information and take necessary steps to receive care. The information architecture of our website (which defines its structure and organization) has been tested with real Veterans, and the VA’s Content Style Guide helps us choose words that are relatable to everyone. <more TBD>

**How to do it**

> Use plain language and follow the <VA Content Style Guide>. <consider using an example>

Notes:

> Use the content design that is (no ridiculously long accordions)

Content design work has been done

You can see these elements in the new Content Management System (CMS)

> Follow CMS guidelines so the content design stays unified

Guidelines for approaching the writing of detail pages?

Rules for creating new pages - they should align with the existing IA

**Key questions**

* TBD
* TBD

### 3. Create guidelines for content ownership and authority.

Authority defines who is empowered to make strategic and day-to-day decisions about the content of our website. Ownership defines who is responsible for the creation and maintenance of each piece of content. These guidelines help maintain the integrity of the information on our site <More TBD>

Notes:

We don’t want everybody making updates willy-nilly

We have a process where SMEs, clinical directors, and (other people?) can put their information into the pipeline, it can go through the approval process.

This way the content gets to the right people, in the right way, at the right time

Also consider ‘sensitive’ content types where descriptions must be accurate

**How to do it**

Define the types of content on the site (e.g., “If you have health clinical services needs, route the request to Shelley and she will get them published by clinical people.”)

Define who is responsible for what content  
What’s the approval process?

Who to contact if you have an issue with data or you have some data to update. (E.g., “Put in a request with Jenny HL and she will coordinate with the API team.” )

Discuss facility API and how it automatically updates some things. Explain why. Explain who to contact if you find something you can’t update (like business hours).

**Key Questions**

* <TBD>
* <TBD>

### 4. Maintain harmony between VA national, VA regional, and VA local content.

Notes:

We create content that complements national content

If it’s already handled at the national level, our content should complement that.

The VA.gov user experience (like My HealtheVet) is a national experience, but the patient experience is local and regional.

National, regional, local - we don't want to reproduce content that has already gone through user testing. Draw from and build upon national content that's already created.

Veteran doesn't want conflicting info - they want it to be simple - so we don’t want to ‘repeat ourselves’ by re-stating national level content

**How to do it**

> TBD - actionable parts of this - guidelines

Content editors and the API tool:

Pulling information from the API makes it more consistent, accurate

Healthcare descriptions have national, regional, and local descriptions

The API tool was set up to standardize the presentation of the content

Explain which things content editors can do themselves in Drupal, and what they can’t edit because it’s pulled in via API?

**Key questions**

* TBD
* TBD

### 5. Understand the specific purpose and audience of your content.

Web content is like a product - It must serve a specific purpose for a specific user

Some content needs white-glove treatment, other content has more wiggle-room

(explain tiers)

Task-based content (tiers one and two) that achieves a purpose gets a higher profile.

There are more guidelines around this kind of content to protect its integrity - more control is maintained. This kind of content works to achieve very specific actions (i.e., Make an appointment, Become a patient)

* Make an appointment
* Become a patient
* Locations
* Services

Information for vendors, partners, staff, and community (tier three) is less sensitive, but serves an important purpose (spreading awareness, community involvement, growth and health of VA Pittsburgh as an organization, research, etc)

* Stories and events
* Policies, careers, etc
* About us

If we understand the different purposes for various content types, we can set up processes to make sure the most important information is easy to find for users.

**How to do it**

> TBD <specific guidelines and instructions related to this>

**Key questions**

* TBD
* TBD

### 

### 5. Measure how well the content does its job and use data to improve it.

Since we have taken the time to understand our users and identify how our content will shape their journey to care and services, we owe it to ourselves and the Veterans to measure how well our content is doing its job. <more TBD>

**How to do it**

<TBD>

Ideas:

Identify tools, processes (Google analytics?)

Define objectives (how will we know the content is doing its job?)  
Good opportunity for Shelley and team to define what metrics are most important to track

Identify who is responsible for this (this may be too granular)

**Key Questions**

* Are users following a clear path to the service they need, or do they click around a lot?
* What percentage of users end their site visit with a phone call to obtain care or services? How can we tell?
* More questions

## Our website

<TBD> Intro

### Home

<This is the kind of content that lives here>

<guidelines, recommendations>

Tier 1-2 content

### Locations and Services

<This is the kind of content that lives here>

<guidelines, recommendations>

Tier 1-2 content

### News and Events

<This is the kind of content that lives here>

<guidelines, recommendations>

Tier 3 content

### About Us

<This is the kind of content that lives here>

<guidelines, recommendations>

Tier 3 content

### Content Types?

Is it useful to address the different content types in Drupal? Might be too in-depth for this playbook. Or maybe there are ways to work them into the Principles section.

Recommended: High level content model map that allows us to demonstrate governance on the national, regional, local levels and how they relate

Recommended: AX should be optimized to compliment this playbook and empower content authors / editors to remember and adhere to these guidelines!

## FAQs

Section TBD if needed - talking to Shelley’s team will help determine this

For internal use - not for publication with final

## Reference

[Jodi’s notes that explain what this is going to be](https://docs.google.com/document/d/1zdxApPILX9y2G_st0M09ZRF9KyEBfmtUbgbj7505Di4/edit?pli=1#heading=h.rlu6k0nv32dt)

[Recording of a call where this was discussed](https://zoom.us/recording/share/KaS_7KC6VdfHuJJTHBb06fk6dho09uARMG8tLGExCyiwIumekTziMw)

[Definition and scope of this deliverable](https://va-gov.atlassian.net/browse/VAGOV-1901) (this is just an outline)

Eventually we’ll get to the [details](https://va-gov.atlassian.net/browse/VAGOV-1990)

[CMS research at Pittsburgh facility](https://va-gov.atlassian.net/wiki/spaces/VAGOV/pages/37617852/VA.gov+CMS+research+Facility+VAMC+Pittsburgh+veteran+patient+research)

[Facility AX Findings](https://va-gov.atlassian.net/wiki/spaces/VAGOV/pages/41189446/Facility+AX+Findings)

[Megan’s playbook deck](https://va-gov.atlassian.net/wiki/spaces/VAGOV/pages/25591930/VA.gov+Governance+Playbook?preview=/25591930/52330724/VA%20Governance%20Playbook_MVP.pptx) - high-level view; could contain some relevant info

[This could look a lot like the USDS Playbook](https://playbook.cio.gov/)

The content style guide will live: design.va.gov/content empower them with this toolkit to manage

This playbook empowers you to show why you choose which words, allows them to their job,