# **VA.gov CMS: Facilities Operating Status, Round 1**

**Research plan**

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| Project Name: | Facilities Operating Status AX User Research,  Round 1 |
| Date: | August 22 -23, 2019 |
| Guide: | [Moderator Guide (gDoc)](https://docs.google.com/document/d/151Eo9Vo6dteniKyR7cqFRzCXazKvAjmILxuYK4iu1I8/edit) |

This research focuses on evaluating the functional implication of linking **banner** **alerts** (under the header) and **on-page alerts** (top of page)to an **operating status** (normal hours and services, limited hours or services and closed)in Drupal.

We’re assessing the need for authors to create a **series of alerts** and subsequent updates for a single event (e.g., a hurricane) on an **alert detail page**—and evaluating the basis for sending **email notifications** to subscribers concurrently. And lastly, we’re exploring the necessity for alert **expiry dates**—including the option to be **dismissible** by viewers.

# **Goals**

This document outlines the details for round 1 research regarding the potential interplay between operating statuses and banner/on-page alerts, gathering feedback on a potentially streamlined authoring experience for creating alerts—including peripheral tasks such as sending email notifications to subscribers concurrently, and archival.

**Overall goals:**

* A facility operating status will be tied to an on-page Facility alert. These will be the Facility operating status options in Drupal:

1. Normal facility hours and services
2. Facility notice = blue info alert
3. Limited services or hours = yellow warning alert
4. Facility closed = red error alert

* Evaluate the need for authors to create an alert “series,” on a facility detail page.

**Feature-level goals:**

* When an operating status is set to B, C or D, then an alert status is published next to the facility name on these pages:
  1. Our locations Page ([View](https://staging.va.gov/pittsburgh-health-care/locations/))
* When an operating status is set to B, C or D, the author is prompted to create an on-page alert that will publish at the top of the respective facility page ([Example](https://app.zeplin.io/project/5d014fd159c9931608872c98/screen/5d37270c90d2e341220055cd))
* Authors have the option to remove the alert(s) on the facility page and archive
* Authors should have a checkbox that allows them to make a banner alert dismissible
  1. Gather feedback and document specifications for what qualifies as a dismissible alert
* Authors should have a dropdown that allows 1-30 days to publish before the alert expires
  1. Authors will need to re-publish the alert if longer than 30 days
* Drupal should have a *reuse alert block page* targeting mechanism
* Assess the need for an alert archival system or remain accessible

**Background:**

* The current CMS creates several limitations to supporting a streamlined authoring experience when creating facility and VISN alerts such as 1) the need to edit multiple pages for one alert during high-pressure situations 2) the lack of a yes/no option for sending email notifications to subscribers 3) an archival system for tracking updates versus overwriting them 4) the inability to write “free text” for individual alerts on the operating status page 5) the inability to add an alert detail page and subsequent updates, and 6) the inability to link alerts to an operating status.

**Research Questions:**

* Is it useful for authors to create an alert “series,” since there is no parent-child relationship?
  + What situations require authors to send email notifications to subscribers?
* How do authors differentiate between facility and system alerts?
  + Alert banners = System alert?
  + On-page = Facility alert?
* What does the VISN level look like in the CMS?
  + How does a VISN initiate VISN-wide alerts?
  + How does a VAMC initiate VAMC-wide alerts?

**Research Hypothesis:**

* We believe designing a streamlined authoring experience that supports linking an operating status with a facility alert will increase an author's competence, reduce time, and improve efficiency.
* We believe that adding AX features such as sending email notifications, setting expiration dates, and archiving will add more granular control within the authoring experience.

# **Method**

* What method of research are you planning?
  + Remote, moderated task-based usability testing
    - Zoom will be the screen collaboration tool/recording
  + Prototype/wireframe with proposed editing and publishing workflow
    - Observe authors publishing a VAMC-wide banner alert
    - Observe authors publishing an on-page facility alert

# **Participants and Recruitment**

* Participants Screening Criteria
  + VAMC Pittsburgh Web Managers
    - Kim G.
    - Ryan S.
    - Shelly N.

# **When?**

* August 22 - 23, 2019
* The research materials will be done by August 19, 2019
  + AX User Research Plan: Lapedra Tolson (August 13, 2019)
  + Moderation guide: Lapedra Tolson (August 20, 2019)
  + Prototype: Lapedra Tolson (August 20, 2019)

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# **Team Roles**

Please list the people who will be serving in each role. Include the primary phone number for moderator and the emails for moderator, notetaker, and observers.

* Project POC: Andy Lewandowski, [andy.lewandowski2@va.gov](mailto:andy.lewandowski2@va.gov)
* Research Lead: Lapedra Tolson, lapedra.tolson@agile6.com
* Moderator: Lapedra Tolson
* Notetaker: James Hupp, Kevin Walsh

# **Resources (complete after research)**

* [AirTable](https://airtable.com/shrm00Ji44Nl06OFv)
* [Confluence](https://va-gov.atlassian.net/wiki/spaces/VAGOV/pages/140869747/VA.gov+CMS+Facilities+AX+Operating+Status+Research+Round+1+August+2019) (Also includes Design Recommendations and Sketch files)