[See Airtable for index of all Round 3 research docs](https://airtable.com/tbli6in0b351ww5k7/)

# VA.gov CMS: Facilities AX Usability Testing, Round 3

**Moderator Guide**

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| Project Name: | Facilities AX Usability Testing, Round 3 |
| Date: | June 25-27, 2019 |
| Plan: | [Research Plan (gDoc)](https://docs.google.com/document/d/1eATB5cs4njdKtYusAZ2NKD_8LKd2NHNjZvynPOW2FKk/edit) |

## 

## Research questions

1. What resources do editors need to effectively use the CMS?
   * Potential gap: “how to” or “resource page”
2. What is the perception/understanding of *National, Regional and Local* content? Do editors prefer different labels to identify content?
   * Resources: [Annotated health service model](https://app.mural.co/t/vagov6717/m/vagov6717/1560979687857/11c85cabdaeb0cd4ceb02ca884d233f1d151e91f) & [Health Service Offeringsdashboard](http://stg.cms.va.gov//health-service-offerings) on staging
3. What are the most common errors when entering and editing content?
4. Will editors understand the connection between AX elements (e.g. accordions, content blocks) and how it’s displayed on va.gov?

## Set up

* 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

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## Important Links

|  |  |
| --- | --- |
| Meeting Link: | Different for each session, see meeting invitations |
| Prototype: | [https://invis.io/KYSH5E2T94](https://invis.io/KYSH5E2T94U) |
| Staging Link: | <https://staging.va.gov/pittsburgh-health-care/make-an-appointment/> |
| CMS Link: | <http://staging.cms.va.gov/pittsburgh-health-care/make-an-appointment> |

## Interview Reminders

* Ask open-ended questions
  + DON’T ask multiple-choice questions
  + DON’T ask yes/no questions
* Ask open ended questions
  + So what… is…
  + What is this page telling you?
  + What do you expect to see next?
  + Are you looking for any info that you’re not seeing here?
  + What would you do next?
* Bring your curiosity
  + DON’T assume. Ask why!

## Participants

See

* [participant tracker spreadsheet](https://airtable.com/tblZ0anqceIrbHmYA/viwx0WQ0NEkYteAAv?blocks=hide) (AirTable) - good for overview
* [participant tracker](https://docs.google.com/spreadsheets/d/1LrAxNqMbc9R7nXQobdLCzC1YUTqqkr9-Jf_HVS4n3jc/edit#gid=691247829) (Google sheet) - good to see timeline and overlaps this week

# 

# Hello & Welcome (~5m)

#### Greeting

* Thank you so much for joining us today! I’m \_\_\_\_\_\_\_\_\_\_, here on behalf of the Department of Veterans Affairs to learn from you and other VA staff about how we can improve the authoring experience.
  + [Notetaker] And I am \_\_\_\_\_\_, here to take notes for our discussion.
* How are you?
* This entire session should take about 45 minutes. I want to be sure not to keep you longer than that, so I may occasionally prompt you with the next question or topic.
* During this chat, we’re looking for feedback on some ideas for tools that may help the content team at this facility write and publish their work.
* If for any reason, and at any time, you would like to stop or pause the session, please let me know. It’s totally ok.

#### Explain what you will cover

* Let me walk through what we’re going to cover today.
  + First, we’ll show you the current Drupal CMS and get general feedback on the overall structure.
  + We’ll ask you to do a few things within the CMS. so you’ll need to be logged in. Do you have your login information?
  + We’ll also show you some ideas and maybe introduce some new terminology, and we’d like to get your feedback on it all.
* Sometimes I may sound like I’m asking “why” a lot, but that’s because I want to make sure I’m understanding you.

#### Getting permission to recording

* While we’re taking notes, we want to make sure that we don’t miss any important parts of our conversation. We’d love to record the session, in case we need to remind ourselves of something. Is that OK? **Press record on Zoom.**
* Do you have any questions before we begin?

# The Interview (~40m)

### Introduction (~5 mins)

* How long have you worked for VA?
* Can you tell me about your current role?
  + Depending on how much they share about their interactions with Veterans:
    - Can you tell us about your relationship with Veterans? How often do you interact with Veterans?
* What does success mean to you in your role?
* Can you describe your level of familiarity with the VA.gov content? How do you typically interact with it? (e.g., Do you create it, edit it, approve it?)
* For content that you might be responsible for, do you have a process for informing that content? If so, what does that process look like?
* What is your biggest content-related frustration right now?

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## CMS Usability Testing (~15 mins)

### Task 1: Finding and editing a detail page (Make an Appointment)

**Research goals/questions**

* Evaluate editors pain points around finding and editing a detail page in the CMS.

**Interview questions**

* **Start:** [http://staging.cms.va.gov/admin/content](http://staging.cms.va.gov/admin/content%5D)
* Let’s log into the CMS using your username and password.
* I’d like us do two things.
* First, I’d like you to walk me through how you would make an edit to the “Make an Appointment” page.
  + How was that for you?
  + How difficult was it to find the detail page? Tell me more.
  + What did you find cumbersome? Why?
  + And what parts, so far, do you like and think we should retain? Why?
  + **[If they explored the content tabs]** 
    - What are you looking for under these tabs?
    - Why did you expect X to be there?
    - When would you expect to use X in your daily workflow?
  + What does “content type” (header in the table) mean to you?
  + **[If they used the Filter within the search area]** 
    - Why did you use the filter? Did it work as expected?
    - Did anything make it difficult to use? What would you change about it?
  + **[When they find “Make an Appointment” page and/or to Edit link]**
    - What is this page telling you?
    - Are you looking for any info that you’re not seeing here?
    - What would you do next?
  + **Ask about:** 
    - Title/Meta title/Intro
    - Featured content block
    - Content blocks components (paragraphs browser UI)
    - Tabs: Revisions, other moderation tools
    - **[low priority. If time permits]** Show the *Make an Appointment* page on the front-end and inquire about the intuitiveness and understanding of how the AX elements connect to the front-end.

### Task 2: Entering and editing health services content

**Research goals/questions**

* What challenges do editors experience when entering and editing health services content? Is it intuitive? Are the AX labels clear and can editors make a clear connection between the content blocks/AX elements and how the content (e.g. accordions, paragraphs) displays on the front-end? In what areas of improvement can we reduce cognitive load and increase efficiency within the editorial process?

**Introduction: National, regional, and local health services content**

* The new site allows regional health care systems like VAPHS to list details about the health services they provide on their website. These details appear on several different pages, but content authors such as yourself will approach editing them in the cms in a different way than you would a typical page.
* In the cms, we’ve broken this information into two different categories: regional descriptions, and local descriptions.
* The **regional description** provides a brief description of services that are specific to the Pittsburgh region as a whole (such as VAPHS). It lets Veterans know more about care, procedures, or programs that are specific to the region's facilities.
  + Here is an example of how regional description content appears. ([Open the our services page](https://staging.va.gov/pittsburgh-health-care/health-services/), open the podiatry accordion. Highlight the content under the “Care we provide” heading.)
* The **local description** provides location and contact information specific to each facility location (such as University drive campus or Beaver County Outpatient Clinic). This content tells Veterans where to go and who to call to get the service at a particular location.
  + Here is an example of how local description content appears. ([Open the University Drive location page](https://staging.va.gov/pittsburgh-health-care/locations/pittsburgh-va-medical-center-university-drive/). Open the podiatry accordion. Highlight the content under the “Make an appointment or contact us” heading.)
* We’ll have a chance to discuss more of the *why* behind this design later on, but before we proceed, do you have any questions about what I just explained?

**Interview questions**

* **Start:** <http://stg.cms.va.gov/admin>
* Now that we’ve provided a bit of context for this content, can you walk me through how you would go about making an edit to the phone number for Podiatry that appears on the University Drive campus location page?
  + **[If they selected a different content type from the dropdown menu]**
    - Why did you select the [whichever content type they selected]?
    - Did you find what you expected here?
    - Why or why not?
  + **[If they selected the “local health services offering” content type]** What was it like to locate the local health services offering?
  + What did you find difficult? Why?
  + Based on your understanding of the “local health services offering” so far, what other kinds of content besides phone numbers would you expect to find and edit here? Why?
  + What was it like to locate this content using the “local services offering” label in the content type dropdown menu ?
  + **[If they managed to locate the correct content type]**
    - What (if anything) helped you locate the local health services offering?
    - What kind of written guidance or reminders might have helped you find and edit a health service more easily?
    - Do you have other suggestions for what might have helped you find and edit a health service more easily?
  + Do you have any further comments or suggestions to add?

## Prototype (~10 mins)

### **Task** 3**:** **Feasibility of Facility Dashboards improving editorial workflow**

#### **Research goals/questions**

* Conduct preliminary testing with editors and gather feedback about the feasibility and usability (its features, together with the context of the user) of the Facility Dashboard MVP. Evaluate proof-of-concept for organizing content, facilitating the editorial workflow and general wayfinding.

**Interview questions**

* **Start:** [https://invis.io/KYSH5E2T94](https://invis.io/KYSH5E2T94U)
* Now that you’ve had the chance to get familiar with the CMS, I’d like to switch gears. We’d like to get feedback on a sort of launch pad or dashboard for everything that you need to view and have access to within the CMS. We’re hoping that *something like this* can be the first thing editors see when they open up the CMS. Please keep in mind that this prototype may not function exactly the way you expect. Some areas of the prototype will be clickable, and some will not. Any questions?

* Walk me through how you would edit content on the Pittsburgh VA Medical Center - University page.
  + Are there any features you found helpful or confusing? If possible, what features would you add that would improve your daily process?
  + How often (e.g. per week/month) would you be editing either the University Drive or Heinz content? ? What is the editing frequency for each of these content areas?
  + How useful is it to know who has access to the content and their level of permissions? Why?

## CMS Resources (~5 mins)

### Discussion: What resources do editors need to effectively use the CMS?

**Research goals/questions**

* This is our stated goal for the CMS: The new Drupal CMS is a tool for VA to manage content that powers the Veteran-first experience on VA websites. The driving force behind creating the Drupal CMS is to satisfy certain aspects of VA’s digital modernization plan. The new approach is part of an effort to disentangle the myriad of VA websites, consolidate multiple VA brands, create opportunities to programmatically crosslink related content, and provide an experience that represents best practices for digital content experience and design.
  + The new CMS will make it easier for you to know which aspects of the Veteran experience you are responsible for and help you create content that meets shared VA goals.

**Interview questions**

* I’d like to have a general discussion about the CMS and the resources you’d like to see that would help you when using the CMS.
* What are your impressions of the CMS?
* How do you think it will impact how you communicate with Veterans and other users?
* What kind of technical support do you think would you need?
* How important are design principles? How do you think you would use them?
* Similarly, would you use content or writing principles if they were presented to you? How do you think you’d use them?

## Wrap-up (~2 min)

* Did anything surprise you about what you saw today?
* If you had a magic wand and could change one thing about what you could do, what would you change (and why)?
* What one piece of advice do you have for the team so that a new CMS could help you accomplish what you need?

# 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>
* I’m going to stop recording.
* We would like to thank you for your time with this gift card. It’s worth $30 and can be used at any Starbucks location.
* [If not at time] Do you have any questions for me at this time?
* Thanks so much for helping us out!