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

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

**Research plan**

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| Project Name: | Facilities AX Usability Testing, Round 3 |
| Date: | June 25-26, 2019 |
| Plan: | [Moderator Guide (gDoc)](https://docs.google.com/document/d/1P6s-msCAAXlon5kR4Qsd02vd_JjG_OqNMibX3XKwSJI/edit) |

This research focuses on evaluating editors’ understanding of **national, regional and local descriptions** and their position within the overall page structure. We’re assessing editorial workflow and design for **creating and editing pages in the CMS and use the moderation (revision) tools**. Lastly, we are conducting a field test with the **Facility Dashboard Invision prototype** - evaluating a design for organizing content, facilitating the editorial workflow and general wayfinding.

# Goals

* This document outlines the details for round 3 of usability testing on the editorial workflow with the new CMS, and the facility playbook as a guide
* Overall goals:
  + Gather feedback about the usefulness of the national (general), regional and local description definitions
  + Evaluate editorial workflow (create, review, edit, and publish content) within the current CMS
  + Field test the Facility Dashboard MVP and its usefulness for facilitating the editorial workflow
* Feature-level goals:
  + Evaluate general comprehension of AX elements, content labels and taxonomy
  + Gather feedback about the Revisions feature and the ability to compare edits, correct mistakes, leave inline comments, and revert to later drafts
  + Evaluate the *Sections* menu item to organize content by VA administrations [facility dashboard]

Background:

* The research team conducted rounds 1-2 of usability testing with VA Pittsburgh stakeholders to evaluate the feasibility of implementing a CMS template design for reuse across VA administrations.

Research Questions:

* What is the perception/understanding of National, Regional and Local content? Do editors prefer different labels to identify content?
* What are the most common errors when entering and editing content?
* What is the editor’s correlation between AX elements (e.g. accordions, content blocks) and how it’s displayed on va.gov?

Research Hypothesis:

* The Facility Dashboard concept-of-proof will be an easier entryway for editors to understand the content structure, locate and edit pages within the CMS.

# Method

* What method of research are you planning?
  + A usability study will be held at the H.J. Heinz III campus with 3 VA stakeholders. Each participant session will last 60 minutes and will include a short introduction, a general conversation around Facility Playbook resources, National, Regional, Local descriptions, task performances using the CMS, and an Invision prototype field test.
  + Among the tasks: create a new page, make an edit to a detail page, test the moderation (revisions) tool, find/edit a page using the prototype
* Zoom will be the screen collaboration tool/recording
* A clickthrough Invision Prototype
  + Entry points
    - New Sections menu item and VA Administrations navigation
    - All Content Landing Page
    - Locate and edit the Locations Page

# Participants and Recruitment

* Participants Screening Criteria
  + 3 VA Stakeholders
    - Content editor w/ site administrator privileges
    - Content editor w/ 2 - 7 yrs & reviewer permissions
    - Content editor w/ 1 - 2 yrs
* Other criteria: uses the CMS between 5-10 hours a week, general knowledge of roles/permissions, enters unique content w/ limited permissions, knowledge of other assets (e.g. videos, photos, press releases, etc.)

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| **VA staff - 1 hour, 2 participants max per interview** | | |
| SMEs and Health service providers | These actors influence the author experience and inform regional content. SMEs. Health service providers.. They will not be the ones who write or enter it. Learning about the need for adding detail pages. | Priority: **high**  Speak to 3-4 |
| Public Affairs staff (12) | These actors who are responsible for the editorial process (writing and enter content)  **3 people (Louis, Ryan, Kim + Shelley)** | Priority: **high**  Speak to 4 (or more) |
| **Stakeholder convos** |  |  |
| Director of Facility | Maintenance feedback |  |
| MyHealtheVet Coordinators (William.Frazier@va.gov, David .White20@va.gov) | The actor influence how online scheduling for appointments functions at the facility. May be able to generate additional contacts. | Priority: **medium** |

# When?

* June 25th-27th
* The research materials will be done by June 21, 2019
  + Moderation Guide (Lapedra Tolson)
  + Click through Invision Prototype (Lapedra Tolson)
  + Annotated Health Services Mural (Rachel Kauff)
  + Sessions will be 60 minutes each
  + Sessions may be scheduled Wed - Thursday, 9:00am - 5:00pm

# 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.

* **Facility Playbook Resources:** Ryan Sibley | [ryan@navapbc.com](mailto:ryan@navahq.com)
* **National, regional, local descriptions:** Rachel Kauff | [rachel.kauff@civications.com](mailto:rachel.kauff@civications.com)
* **Editorial workflow:** Rachel Kauff
* **Facility Dashboard MVP**: Lapedra Tolson | [lapedra.tolson@agile6.com](mailto:lapedra.tolson@agile6.com)
* **Note-taker(s):** Lapedra Tolson, Rachel Kauff, Meghana Khandekar | [meghana@navapbc.com](mailto:meghana@navapbc.com)
* **Floaters/observers:** Jane Newman | [jane.newman3@va.gov](mailto:jane.newman3@va.gov), Meghana Khandekar
* **Project Lead:** Eric Chiu | [eric@navapbc.com](mailto:eric@navahq.com)
  + Lapedra Tolson will provide Zoom call-information