Research Plan for 18F x VA OCTO, Veteran Beneficiary Travel

Project start date: 3/15/22  
Projected end date: 6/1/22

## Background

Veterans are [entitled to reimbursement for their travel to and from medical appointments](https://www.va.gov/health-care/get-reimbursed-for-travel-pay/). For years, reimbursement happened via a paper process, but concerns were raised through an audit that VA did not have sufficient tracking (i.e. paper trail) to validate that reimbursements were issued in accordance with established policies. To address potential for fraud, waste, and abuse, VA was charged with establishing a digital solution for the submission, validation, and tracking of reimbursement requests. The new system, the Beneficiary Travel Self-Service System (BTSSS), came online in December 2020.

The development effort for the current BTSSS system was not prioritized—likely because the driver for creation of the system was addressing fraud, waste, and abuse—and the site has come under a great deal of criticism for being hard-to-use. To address this, the VA is looking for a user-centric vision to align product stakeholders and ultimately deliver a great experience for veterans.

In addition to not prioritizing the user experience, the VA team acknowledges that [the policies and rules that determine what level of reimbursement veterans qualify for](https://www.va.gov/health-care/get-reimbursed-for-travel-pay/#va-travel-pay-eligibility-for-) is unclear and this complexity is expected to be a significant driver of the challenge in using the system.

[Existing Product Link](https://eauth.va.gov/accessva/?cspSelectFor=bts).

### OCTO Objectives

By focusing on improving the usability of the BTSSS system, and the entire beneficiary travel reimbursement process, this project will address all three of OCTO’s North Stars:

1. Increase the usage and throughput of VA services
2. Decrease the time Veterans spend waiting for an outcome
3. Increase the quality and reliability of VA services

### Veteran Journey

The beneficiary travel reimbursement process lives within several stages of the Veteran Journey:

1. Starting up: Attending to health needs
2. Taking care of myself: Managing primary care and chronic health issues, seeking help for an acute health event, and maintaining my health
3. Putting down roots: Engaging VA to access benefits and services
4. Retiring: Taking care of my health
5. Aging: Managing my declining health

## Research Goals

Identify the blockers between Veterans placing a travel claim, and receiving their reimbursement.

We will do this by identifying the largest pain points and delays within the reimbursement process for Veterans and caregivers.

### Outcome

* Create a vision for the future of the beneficiary travel reimbursement process that inspires stakeholders.
* Clarification of desired outcomes, and an actionable plan to get started on the next phase of the project.

### Research questions

* How and where do Veterans determine if they qualify for travel reimbursement?
* What does it look like to file a travel reimbursement claim? What information is needed and how do Veterans obtain that information?
* Where in the process do Veterans struggle?
* How does the BTSSS system help or impede the claims process?
* Are there any major roadblocks we could remove within the claims process that would improve the process for Veterans and VA staff?
* How long does it take Veterans to receive their reimbursements?
* What does the full claims lifecycle look like?

### Hypothesis

We know that the current Beneficiary Travel Reimbursement system, BTSSS, has received negative feedback for being hard to use. We think Veterans find it difficult to navigate, and also find it hard to understand the requirements. We think that these interviews will help us pinpoint specific instances where Veterans struggle with the BTSSS system, and the entire reimbursement process.

### Method

* [User interviews](https://methods.18f.gov/discover/stakeholder-and-user-interviews/)
* [Affinity mapping](https://methods.18f.gov/decide/affinity-mapping/) to synthesize interview findings
* [Storyboarding](https://methods.18f.gov/decide/storyboarding/) or [journey mapping](https://methods.18f.gov/decide/journey-mapping/) the end-to-end reimbursement process.

### Location

Interviews will be conducted remotely using Zoom.

### Research materials

For moderated interviews:

* [Link to conversation guide](url goes here)

## Recruitment

### Recruitment approach

**Who is your intended audience for this research (e.g. Veterans, caregivers, VSOs, SMEs), and how will you recruit them?**

Veterans or caregivers who have filed beneficiary travel reimbursement claims via BTSSS. We intend to use Perigean for recruiting.

**Which inclusive research strategies are you leveraging for this study?**

We’d like to use the Lean MVS Strategy for this round of interviews, as we’re conducting a small, 10-week research sprint, and our biggest goal is identifying common pain points within the existing beneficiary travel reimbursement process.

### Recruitment criteria

**List the total number and type of participants for this study:** We would like to interview between 4–6 participants, who can be a mix of Veterans and caregivers.

**Primary criteria (must-haves) What demographics, experience, and scenarios do you need participants to meet to effectively run your study?**

* Have you traveled to receive medical care within the past year?
* Have you filed a VA beneficiary travel reimbursement claim online (either for yourself, or for someone within your care) within the last 6 months?

**Secondary criteria (nice-to-haves) What criteria would strengthen your results?**

* Have you used the onlinebeneficiary travel reimbursement system (BTSSS) more than once?
* Have you encountered any issues with the onlinebeneficiary travel reimbursement system (BTSSS)?
* Have your claims ever gone into manual review?
* Have you experienced delays getting your claim reimbursed?

## Timeline

### Prepare

**When will the thing you are testing be finalized?**

We are not doing any usability testing in this study, just initial information-gathering interviews.

**Please indicate the date and name of a mock participant for a pilot session.**

* **Pilot participant email**: Donny Kwan (donny.kwan@gsa.gov)
* **Date and time of pilot session**: 4/15 at 4:30pm ET

### Research sessions

We would like to conduct our interviews the week of 4/18, but have flexibility to conduct interviews the week after (4/25).

### Length of sessions

Interviews will last 45 minutes, with no less than 30m of buffer time between sessions.

### Availability

**When would you like sessions scheduled?**

Ideal:

* Monday 4/18, 9am–12:30pm, 2pm–6pm
* Tuesday 4/19, 11am–2pm, 3pm–4pm
* Wednesday 4/20, 9am–11am, 12pm–1pm, 4–4:30pm
* Thursday 4/21, 11am–5pm
* Friday 4/22, 9am–11am, 4pm–6pm

Backups:

* Monday 4/25, 9am–12:30pm, 2pm–6pm
* Tuesday 4/26, 11am–2pm, 3pm–4pm
* Wednesday 4/27, 9am–11am, 12pm–1pm, 3:30–4:30pm

## Team Roles

* Moderator: Mel Choyce (mel.choyce@gsa.gov, (267) 593-2647)
* Research guide writing and task development: Mel Choyce
* Participant recruiting & screening: Perigean
* Project point of contact: Stephen Barrs (stephen.barrs@va.gov)
* Participant(s) for pilot test: Donny Kwan (donny.kwan@gsa.gov)
* Note-takers:
  + Erica Vosseller ([erica.vosseller@gsa.gov](mailto:erica.vosseller@gsa.gov))
  + Emily Theis ([emily.theis@gsa.gov](mailto:emily.theis@gsa.gov))
  + Perigean as a backup for sessions where neither Erica nor Emily can take notes
* Observers:
  + Donny Kwan ([donny.kwan@gsa.gov](mailto:donny.kwan@gsa.gov))
  + Stephen Barrs ([stephen.barrs@va.gov](mailto:stephen.barrs@va.gov))
  + Lauren Alexanderson ([lauren.alexanderson@va.gov](mailto:lauren.alexanderson@va.gov))
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