Office of Community Care (OCC) Veteran Portal

**High Fidelity Testing Facilitation Guide**

04.29.2021

# Introduction and Agenda

### Introduction: 3 minutes

***[Introduce yourself and who else is on the phone (notetakers, observers, etc.)]***

We are a team with the Veterans Experience Office and Office of Community Care working to better understand how Veterans, beneficiaries, and caregivers want to access and interact with information about their community care online.

We have created a mock-up of a community care portal. We are going to ask you to complete some tasks to help us identify problems in the design of the interface and learn about your preferences. I can’t stress enough – we’re testing the pages, not you, and your honest feedback will help us create a more desirable experience. Please don’t hold back. Even small or nitpicky things are helpful. You will not hurt our feelings if you are brutally honest! Once we have reviewed all the pages, we'll ask you about your overall impressions of the experience and take note of any general comments you have.

While we will be taking notes, your responses will be anonymous—nothing will be connected to your name. For us to continue, I do need your verbal consent. Do we have your consent to take notes during the interview and to use your anonymized quotes in our research? ***[document consent]***

Do you have any questions before we begin?

## **User Background**

### Guided Interview: 3 minutes

* Could you tell us a little bit about yourself?
* How long have you been using community care?
* One of the goals of our study is to make sure anything we build is accessible to people with a wide range of physical limitations related to the ability to use a computer to find information. Do you have any disabilities that you would like us to be aware of to help us understand your experience?

|  |  |
| --- | --- |
| Disability | Additional Question Set |
| For all disabilities  *(legally blind, deaf/hard of hearing, movement impaired, personality disorder)* | **Disclaimer:** We are going to ask these next couple of questions because we want to make these new channels as accessible as possible to Veterans with disabilities.   1. If the VA **Community Care portal team** could make accommodations for you and your unique health needs, what would you want them to know? 2. What special technology or resources, if any, do you need to use a computer to find information? |

## **Individual Tasks**

### Usability Testing: 45 minutes

As you go through this form, please verbalize what you are thinking and doing aloud (You can think of this as a play-by-play of where you are looking, what you are doing, what you are thinking, and why.).

**Repeated Questions, Introducing Pages**

* What is your current understanding of <this page> and its contents?
  + Given that assumption, what questions or tasks would you hope to resolve when coming to this page?
* Okay great. Now I want you to take a moment to scroll through the page. Is there anything that jumps out at you?
  + Is there anything you are excited or curious about?
  + Is there anything that stands out as confusing or questionable?

**Repeated Questions, Summarizing Pages**

* What did you run into while completing the task that was confusing?
  + Did any part of the page make you hesitate or require you to revisit it?
  + If so, how could we clarify the language or instructions?
* How did it feel to navigate this page?
  + Would you prefer to find this information elsewhere?
* Is there any other information you would like to see here?
* Is there any information that is unnecessary?
* If you were to run into an issue, how would you get help?

### Task Evaluation

|  |
| --- |
| **Interaction Success:** |
| **[ ] Independent completion -** The participant completed the task withoutcritical or non-critical error  **[ ] Completed with Non-Critical Errors -** The participant completed after non-critical errors  **[ ] Critical Error Committed -** The participant was unable to reach the desired goal/complete the task |

## Portal Homepage

1. It’s a Sunday afternoon and you are getting ready for the week ahead. You know you have an appointment coming up soon, but you don’t remember the exact time or date. Where would you go to **view your upcoming appointments**?
   * What order would you expect to see upcoming appointments in?
   * What would you do if you do not see your community care appointment on this list?
   * Would you want to add self-made community care appointments to this list?
     + If adding self-made appointments to the calendar kept track of the number of appointments you had, would you do it?
   * Would you use the add to calendar functionality?
2. Your appointment is Wednesday at noon with primary care. It’s your first time going to this clinic. **Find the address for your community care doctor.**
   * How do you know this is a community care provider?
   * How would you like your care team prioritized?
3. You notice that you are still not able to schedule your podiatry appointments. It’s been a few weeks and you want to check for a status update. **Find the tracker and let us know the status of your podiatry consult**.
   * What do you think is happening in each of these process steps?
4. Your primary care provider has uploaded notes from your recent visit. **Spot the alert or show us where you would go to view the doctor’s notes.**
5. You have a question for your provider about the notes from your most recent visit. **Show us how you would send them a message.**
   * What made you choose this pathway to secure messaging?
6. You noticed that you only have a few days left of your [medication that is in the prototype] prescription. Show us how you would **request a refill on this prescription**.

## Billing and Financial History

1. You know that your most recent visit has an outstanding balance that is due soon. Show us how you would **find your outstanding balance and pay the bill**.

* What made you choose this pathway to pay your balance?

1. You need to find out how much you spent on medical care last year to plan for the year ahead. **Find your 2020 bills.**

* *(If they did not use the filter, ask)* Did you notice the filter? Is that a functionality you find useful?

1. You recently had a big procedure that was not fully covered. Show us how you would **set up a payment plan** to pay this bill over time.

* What do you think is happening in each of these process steps?

## Disputes and Reimbursements

1. Your community care podiatrist sent you a bill, but you have an authorization for that care. Find out where to **dispute a bill from a community care provider** for authorized care and submit your claim.

* What do you think is happening in each of these process steps?

1. [FMP Only] You need to submit documentation about a recent bill for service-connected care. Show us how you would **submit the bill for reimbursement**.

* What do you think is happening in each of these process steps?

## Community Care Frequently Asked Questions

1. You want to catch up on all the messages you have received from the VA and your providers. **Find the messaging center**.
   * What do each of these options mean to you?
   * What would you expect to find in your inbox?
2. You just recently began using community care. Show us where you would go if you were looking for **more information as someone who is new to community care**.
3. You are not feeling well and need to seek emergency care at the nearest hospital rather than your VAMC. Show us how you would **find out how to ensure you are covered for service-connected care**.

# Closeout

### Guided Interview, 3 minutes

1. Now that you have walked through various scenarios of how you could use this portal, do you have any questions left unanswered?
2. What did you think of your experience using the portal overall?
3. What did you like the most about this portal? The least?
4. We have some evaluation questions we would like to ask before we close out, but before that, we want to open it up for our colleagues on the line to ask any questions they might have.

# Evaluation Questions

### Likert Questions, 3 minutes

Before we wrap up, I have five short questions asking you to evaluate your experience with the portal you created. I am going to read you a statement and ask you to please give me a response on a scale of 1-5. One being strongly disagree, three being neutral, and five being strongly agree.

* With this tool, I would find it easier to keep track of my care.
* This tool would improve my experience with community care.
* This tool would give me faster access to my community care information.
* This tool would enable me to solve a community care issue on my own.
* I would save time using this tool.
* I would use this tool. (Y/N)

Thank you so much. Do you have any final questions for us?

We really appreciate you taking the time to speak with us today. Your willingness to share will help improve the experience of Veterans, beneficiaries, and caregivers in the future.