Office of Community Care (OCC) Veteran Portal

**Research Screener**

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Client: Office of Community Care (OCC)

# Overview

Team  
Department of Veteran Affairs (VA)

Veteran’s Experience Office (VEO)

Office of Community Care (OCC)

## Product

A Veteran-centered OCC portal designed using Sketch.

## Project Background

The VA Office of Community Care (OCC) Portal seeks to provide users with easy access to information and the ability to perform certain self-servicing actions related to community care. The Portal will be internal and external to the VA. While users will include Veterans, caregivers, beneficiaries, and VA employees, our focus will be ensuring a seamless Veteran experience while thoughtfully incorporating accommodations for other users.

The HCD team will synthesize findings and develop a research insights report, as well as a clickable prototype to demonstrate Portal features and capabilities.

## Research questions

Human-centered design applies a rigorous approach to investigating how Veterans, beneficiaries, and staff would prefer to interact with a portal through interviews and other methods. The findings will inform experience strategy and subsequent prototypes.

## Project Scope Statement

To improve the Veteran experience accessing care outside of VHA by integrating community care data and related functionality into VA.gov. The research will focus on centralizing available tools and integrating personalized community care information prioritizing scheduling, authorizations, billing, and communication. Research insights will inform the following objectives:

1. Understand user expectations for communication and access of community care related tasks and information.
2. Determine which self-service capabilities and information are most crucial to implement in the portal in a phased approach.

## Hypothesis

By integrating community care information into a single VHA portal, Veterans, caregivers, and beneficiaries will find it easier to access care, communicate with key stakeholders, and understand billing, which will result in less reliance on VA staff for guidance.

# Research Methodology

Interviews will be **remotely moderated** with a facilitation guide, as well as a series of interactive activities intended to probe deeper thinking and capture notes.

## Research Activities

Please note that activities will be happening simultaneously. A 1:1 interview will be the primary focus throughout the session and used as a guide to facilitate the remaining activities. All will be combined into one session per participant, but they are broken down in this document to detail rationale.

### 1:1 Interview

Individual interviews allow researchers to probe into the user's past experiences and identify significant expectations or concerns for their future service interactions.

#### Why this method?

By telling us what has succeeded, failed, and how past user-agent interactions affected VA engagement, we can better understand the perception of VA and improve both staff and user experiences through developing a comprehensive portal strategy.

### Usability Testing

Participants are asked to perform tasks, while the researcher observes the participant’s behavior, watches for pain points, and listens for feedback.

#### Why this method?

By observing user interactions, we can identify problems in the design of the interface, uncover opportunities to improve the interface and interactions, and learn about the participants’ behavior and preferences.

## Remote Facilitation Tools

### Zoom

Video conference, screen sharing, and dial-in number **provided by Perigean**.

***Important:*** *Participants and moderators will be instructed not to put PHI and PII in MURAL.*

# Participants and Recruitment

## Participant Criteria

**Goal: ~14 total interviews; 6 with Veterans, 5 beneficiaries, and 3 caregivers.**

We would like to recruit users who have full access to technology (internet, laptop, smart phones, etc.)

* Veterans: 6
* Caregivers: 3
* Beneficiaries: 5

## Screening Questions

**For Veterans**

* Have you previously been or are you currently authorized for community care (covered by the VA to see healthcare providers outside the VA, formerly VA Choice program)?
  + **If yes, then continue.**
  + **If no, do not continue.**
* Can you access a laptop or desktop computer with an internet connection?  
  + **If yes, then continue.**
  + **If no, do not continue.**
* **Language:** Must be fluent in spoken English so the researchers can communicate with them.

**For Caregivers**

* Has the Veteran you care for previously been or currently is authorized for community care (covered by the VA to see healthcare providers outside the VA, formerly VA Choice program)?
  + **If yes, then continue.**
  + **If no, do not continue.**
* Can you access a laptop or desktop computer with an internet connection?  
  + **If yes, then continue.**
  + **If no, do not continue.**
* **Language:** Must be fluent in spoken English so the researchers can communicate with them.

**For Beneficiaries**

* Are you a beneficiary participating in any of the following programs?
  + CHAMPVA
  + Camp Lejeune Family Member Program
  + Children of Women Vietnam Veterans Health Care Benefits Program
  + Spina Bifida Health Care Benefits Program (SBHCBP)
  + **If yes, then continue.**
  + **If no, do not continue.**
* Can you access a laptop or desktop computer with an internet connection?  
  + **If yes, then continue.**
  + **If no, do not continue.**
* **Language:** Must be fluent in spoken English so the researchers can communicate with them.

## Demographics

Mirror general Veteran population and over-sample largest minority groups based on the national Veteran population model:

* + - <https://www.va.gov/vetdata/docs/Demographics/New_Vetpop_Model/Vetpop_Infographic_Final31.pdf>
    - <https://www.va.gov/VETDATA/docs/SurveysAndStudies/VETPOP.pdf>

And it reflects beneficiary use of community care:

* + - <https://www.gao.gov/products/GAO-19-478>

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| --- | --- | --- | --- |
| **Perigean Recruitment Details Relevant to OCC** | | | |
| **Data field or Question** | | **Relevance** | **Recruitment Guideline** |
| **Mandatory Registration Data** | Name, email, address, phone number | Contact participants, evaluate zip codes for population density | * At least 60% rural, of which 10% are hyper-rural |
| **Voluntary Registration Data** | Age | Life stage of the individual | * At least 35% ages 56-74 (baby boomers, retirement) * At least 20% 30-55 (family age) * At least 15% under age 30 (young Veterans) * At least 12% ages 75+ |
| Are you a Veteran, Veteran's family member, Veteran's caregiver, or Servicemember? (Check all that apply) | User type | * At least 13 Veterans * 8 non-Veterans: * 5 Beneficiaries * 3 Caregivers |
| Gender identity | Gender demographics | * At least 35% Women * At least 50% Men * At least 5% Other |
| Year service began, service in combat | War era, active-duty experience | **Not applicable - consideration for analysis only** |
| All VA, VHA, VA Education and Career Benefits and Services that individual has experience with | Level of experience with or curiosity about VA benefits and services |
| How often do you go online to access VA benefits and services? | Familiarity with online interactions, access to channels |
| Contacts used for any questions about VA benefits and services (call my VSO, call local VA center, look on VA.gov, look on Vets.gov, online search, other Veterans, Veteran forum, other) | Preferred and trusted sources of information about VA |
| Device(s) used to access the internet | If individual has a personal device or relies on public resources so that the design team can make recommendations to make the technology accessible to them | * At least 70% full access to internet and technology * At least 5% computer but no smart phone * At least 5% smart phone but no computer |
| Use of any assistive devices, if individual is an amputee or hard of hearing | Use of adaptive technologies, identify individuals with channel dependent needs so that the design team can make recommendations to make the technology accessible to them | * At least 5% movement impaired * At least 5% legally blind or use a screen reader |

***Please deliver an Excel spreadsheet that includes demographic and screener information when scheduling is complete.***

## Recruitment Strategy

Please recruit via the existing recruiting contract.

# Testing Details

## Timeline: Date of Research

**May 4, 2021- May 14, 2021**

All activities are currently planned and the visual aids are in production.

## Length of Sessions

60-minutes

## Availability

We are willing to accommodate most Veteran schedules. Our team is available from 9AM-5:30 PM EST.

* Please allow at least 30 minutes in between each 60-minute session.
* Please ***avoid*** overlap with two sessions during the same time block.
  + **Never schedule more than 1 session within the same time block.**
  + **Please refer to the EXCEL spreadsheet [2021-04-28 OCC Veteran Portal Availability.xlsx] for our official availability.**
* Please **do not** schedule more than 4 interviews in a day. There will also be days where we cannot attend more than 3 interviews in a day. **Please refer to the EXCEL spreadsheet [2021-04-28 OCC Veteran Portal Availability.xlsx] to note max availability per day.** We have blocked off dates and times according to the facilitators’ availability. If a time block is **BLACK** the team is **unavailable**.

## Pilot: Available April 30 or May 3 (9AM EST – 5PM EST)

**POC: Raina Russ (primary) and Em Muller (secondary)**

* [Raina.Russ@va.gov](mailto:Raina.Russ@va.gov)
* [Emily.Muller@va.gov](mailto:Emily.Muller@va.gov)

## Additional Recruiting Requests

* Confirm in advance if a participant has access to a computer, laptop, or tablet with connection to the internet.
* Inform the research team in advance if a participant selects a physical limitation pertaining to communication (such as legally blind or hard of hearing).
* To reduce the no-show rate, please do the following:
  + Confirm each interview with the user *24 hours in advance.*
  + Text or email a reminder to each user *on the morning of their interview.*
  + Call the user to confirm if you do not hear back.

# Team Roles

* Moderators:
  + Brooke Garlin
    - [Brooke.Garlin@va.gov](mailto:Brooke.Garlin@va.gov)
    - (480) 773-8941 (**please do not share with any with users or people outside the VA)**
  + Emily Muller
    - [Emily.Muller@va.gov](mailto:Emily.Muller@va.gov)
    - (703) 229-2301 **(please do not share with any users or people outside the VA)**
  + Raina Russ
    - [Raina.Russ@va.gov](mailto:Raina.Russ@va.gov)
    - (773) 633-6563 **(please do not share with any users or people outside the VA)**
  + Jonathan Pruitt
    - [Jonathan.Pruett@va.gov](mailto:Jonathan.Pruett@va.gov)
    - 319-677-2776 **(please do not share with any users or people outside the VA)**
  + Karen Cutright-Siegrist
    - [Karen.CutrightSiegrist@va.gov](mailto:Karen.CutrightSiegrist@va.gov)
    - 513-505-4268 **(please do not share with any users or people outside the VA)**
* Notetaker:
  + Cynthia Kao
    - [Cynthia.Kao@va.gov](mailto:Cynthia.Kao@va.gov)
    - 913-813-0904 (**please do not share with any with users or people outside the VA)**
* Research guide writing and task development (usually but not always the same as moderator):
  + Brooke Garlin
  + Emily Muller
  + Raina Russ
* Participant recruiting and screening
  + Perigean
* Project point of contact
  + Jonathan Pruet (VEO HCD Lead)
  + Karen Cutright-Siegrist(VEO HCD Project Manager)
  + Raina Russ (VEO HCD Support)
* Participant(s) for pilot test
  + Raina Russ
  + Emily Muller
* Notetakers:
  + See: Moderators

**Several team members are contractors with Booz Allen and Aptive Resources. Please ONLY use VA.gov email addresses to protect Veteran PII. Thank you!**