**Research Plan for eBenefits landing page redesign**

As a designer, I need to create a research plan to share with my team.

**Goals**

1. What product & team are you doing this research for?   
     
   This research is for the EVSS/eBenefits Sustainment Team under Melissa Rebstock and Dale Beehler. With this research the EVSS team plan to evaluate options for updating the main eBenefits “landing page” where users initially start when navigation to find features on eBenefits. We are updating this page to better guide Veterans/users to the right destination (on VA.gov or in eBenefits) and want to assess the impact of proposed changes.
2. Background:   
     
   eBenefits (EBN) is the legacy portal application use by millions of Veterans to access benefit information, apply for benefits, and track the status of claims filed with the VA. eBenefits is in the midst of a multi-year migration of features to the new VA.gov platform which will replace eBenefits. The team is researching UI changes to guide users to VA.gov for features that have migrated from the EBN platform to VA.gov. We would like to show concepts to users and gather feedback on which they prefer to guide us in making updates to streamline the experience.
3. Research questions: What question(s) do you hope to be able to answer after completing this research?   
   1. What is the current experience for users accessing EBN to take advantage of features that are still hosted within EBN?
   2. What is the current experience for users accessing EBN to take advantage of features that have already migrated to VA.gov?
   3. What is the current experience for users accessing EBN to take advantage of features which are ABOUT to migrate from EBN to VA.gov?
   4. What is the current experience for users accessing EBN to take advantage of features which were RECENTLY migrated to VA.gov?
   5. What do users look at on the EBN landing page BEFORE choosing to login?
   6. What usability issues does the current experience present to users when they access EBN to use features?
   7. How can we best eliminate confusion about what users can do in eBenefits vs. VA.gov and get users to the right place most efficiently?
4. Hypothesis: What is your hypothesis for this research?   
     
   Today the eBenefits ‘landing page’ does a poor job of guiding users to the right destination; we can make this more efficient and less confusing for users thus reducing frustrating and improving the overall experience.

**Method**

1. What method of research are you planning?   
     
   Remote moderated observation 45-minute sessions where the user will be asked to access certain features on EBN by navigating the website and prototypes of potential new designs.
2. Why this method? How does this methodology help you answer your research questions?   
     
   It will allow us to observe how easily users can reach their desired destination and collect feedback comparing the current experience and pain points vs. proposed updates.
3. Where are you planning to do your research?   
     
   Remote using zoom account.
4. What will you be testing?   
     
   Navigation around the eBenefits website to access specific features using the current system and prototypes of updated designs.
5. If remote: What tool do you plan to use?   
     
   Zoom

**Participants and Recruitment**

1. Participant criteria: What are you looking for in a participant? (Mention: Number of people, ages, accessibility preferences, geographical diversity, login requirements, VA benefit requirements, familiarity with technology, etc. Keep in mind, the more requirements, the more difficult the recruit, so give ample time to ensure the right participant mix.)  
     
   Recruiting for double the minimum number of Veterans to account for a 50% no-show rate based on past experiences, meaning we will recruit 20 participants and aim for a total of 10 minimum interviews.

Recruitment Criteria:

1. 10 Veterans:  
   * 5 Veterans with existing DS Logon Premium account and with working access to eBenefits who IS also a user with VA.gov.
   * 5 Veterans with existing DS Logon Premium account and with working access to eBenefits who is NOT a current user of or familiar with VA.gov.
2. 10 Non-Veteran Dependents
   * 5 Non-Veteran dependents with existing DS Logon Premium account with working access to eBenefits who IS familiar with VA.gov.
   * 5 Non-Veteran dependents with existing DS Logon Premium account with working access to eBenefits who is NOT yet a user of or familiar with VA.gov
3. Demographics
   * At least four men.
   * At least four women.
   * At least two people under the age of 30.
   * At least two people over the age of 55.
4. Recruitment Strategy What is your recruitment strategy?

Existing Perigean recruiting contract

**When?**

1. Timeline: What dates do you plan to do research?   
     
   10/12/21 – 10/15/21
2. Prepare: When will the thing you are testing be ready?   
     
   10/5/21
3. Length of Sessions: How long do you estimate each session will be?   
     
   45 minutes
4. Availability: If applicable, when would you like sessions scheduled? **Please list exact dates and times in EASTERN Standard Time**.   
     
   Any time that works for the Veteran or the dependent between October 12 and end of day October 15.

Please allow at least 15 minutes in between each 45-minute session.

1. Pilot: Please indicate a date before your sessions begin for piloting your research. Which member of the design team will you pilot your research with?   
     
   No pilot needed given the low technical complexity of the interview session. The research team will want to ensure we are able to access Zoom room but can do that any time before interviews begin.
2. Additional recruiting requests:

* Confirm in advance that each Veteran or Non-Veteran participant has access to a computer, laptop, or tablet with connection to the Internet.
* To reduce the no-show rate, please do the following:
  + Confirm each interview with the Veteran and Non-Veteran participant *24 hours in advance.*
  + Text or email a reminder to each Veteran and Non-Veteran participant *the morning of their interview.*
    - Call the Veteran and Non-Veteran participant to confirm if you do not hear back.

**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. If you need Perigean to take notes for you, indicate that next to Notetaker**

* Moderator: Michael Walker ("Walker, Michael (Insignia)" [Michael.Walker10@va.gov](mailto:Michael.Walker10@va.gov), 757-508-8511)
* Research guide writing and task development (usually but not always same as moderator): Michael Walker ("Walker, Michael (Insignia)" [Michael.Walker10@va.gov](mailto:Michael.Walker10@va.gov), 757-508-8511)
* Participant recruiting & screening: Perigean
* Project point of contact: Melissa Rebstock and Dale Beehler (Government Leads); Michael Walker (Project Manager and Government Contractor)
* Participant(s) for pilot test:
* Note-takers: Augustus Harlow ([Augustus.Harlow@va.gov](mailto:Augustus.Harlow@va.gov), 303.398.5982)
* Observers and Confirmed Participants:
  + “Michael Walker” [Michael.Walker10@va.gov](mailto:Michael.Walker10@va.gov)
  + “Augustus Harlow” Augustus.Harlow@va.gov
  + "Rive, Courtney R. (Insignia)" [Courtney.Rive@va.gov](mailto:Courtney.Rive@va.gov)
  + “Dhavala, Lakshmi (Insignia)” Lakshmi.Dhavala@va.gov
  + "Bogale, Epharm S. (ERPi)" [Epharm.Bogale@va.gov](mailto:Epharm.Bogale@va.gov)
  + "Beehler, Dale" [Dale.Beehler@va.gov](mailto:Dale.Beehler@va.gov)
  + “Rebstock, Melissa” Melissa.rebstock@va.gov
  + “Fitsum Solomon” [Fitsum.Solomon@va.gov](mailto:Fitsum.Solomon@va.gov)
  + “Laurie Baker” [Laurie.Baker@va.gov](mailto:Laurie.Baker@va.gov)
  + “Beenish Ghous” [Beenish.Ghous@va.gov](mailto:Beenish.Ghous@va.gov)

**Several team members are contractors with Insignia. Please ONLY use VA.gov email addresses to protect Veteran PII.**