VA Mobile App: Information Architecture Research

(Mostly) Closed Card Sort Findings

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Today's agenda

- Review results of closed card sort
- Questions & discussion
- Next steps

Acknowledgements

Thank you to everyone who provided feedback, reviewed the report, helped us pilot and contributed hypotheses to this work:

Rafael Arroyo

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Kristen McConnell

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Alex Taylor

Background & Goals

Background & goals

The VA Mobile app was designed to allow Veterans to more easily complete key transactions across VA Health and Benefits services.

As the app grows in its feature set, we need to understand how Veterans would navigate benefits and health services within the mobile app. We want to ensure the structure and organization of the app makes sense and can accommodate the new features we have identified as being of interest on our roadmap.

The **purpose** of this work is to inform the information architecture, content and design of the VA Mobile app in order to deliver a solution that is usable, useful, and extensible.*

Our **goal** in this study is to:

- Understand how users think about the current and possible future content in the VA mobile app
- Confirm what the high-level information architecture categories should be in the VA mobile app

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Lean user research & IA process

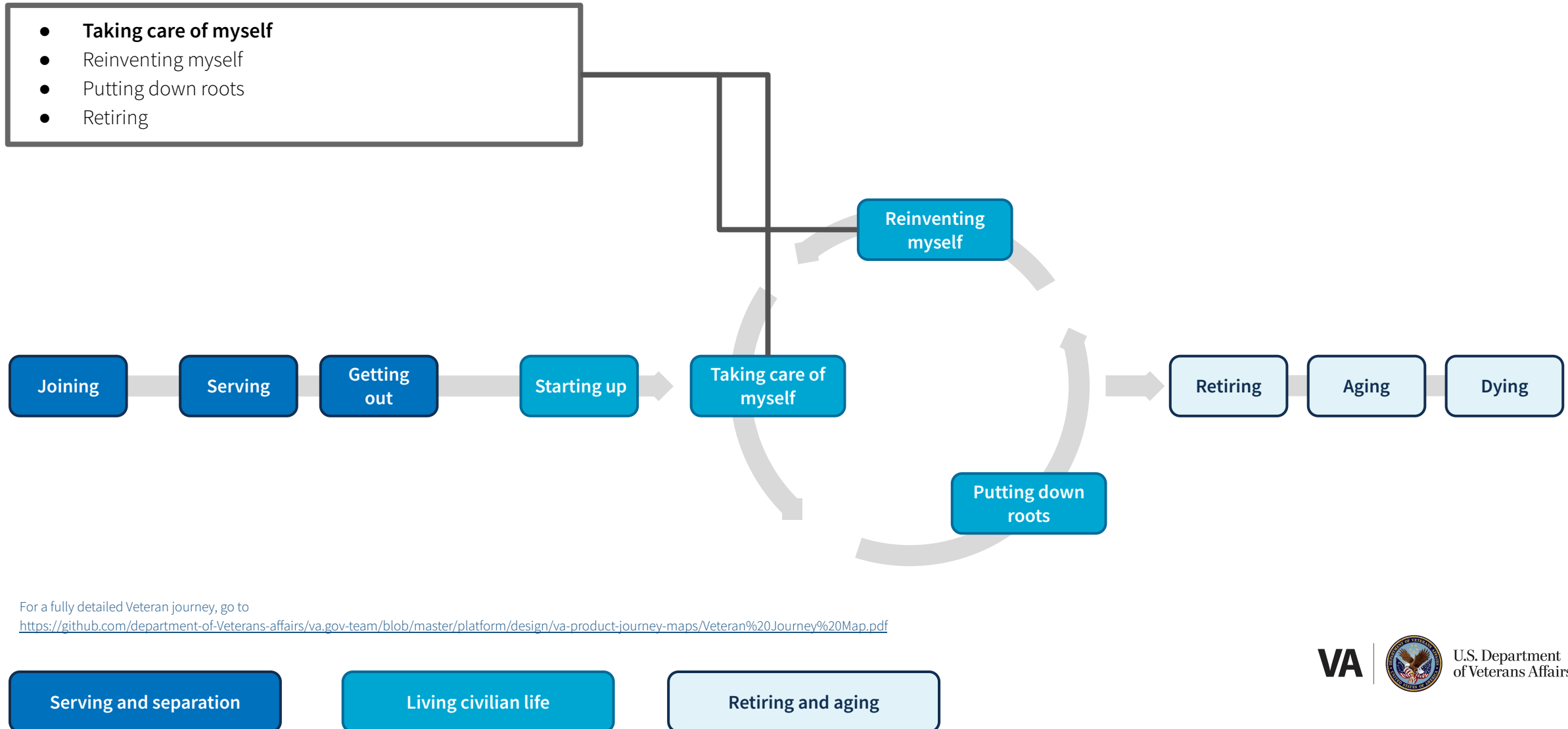This card sort is the second piece of a three part research study:

Last updated 3/18/2022
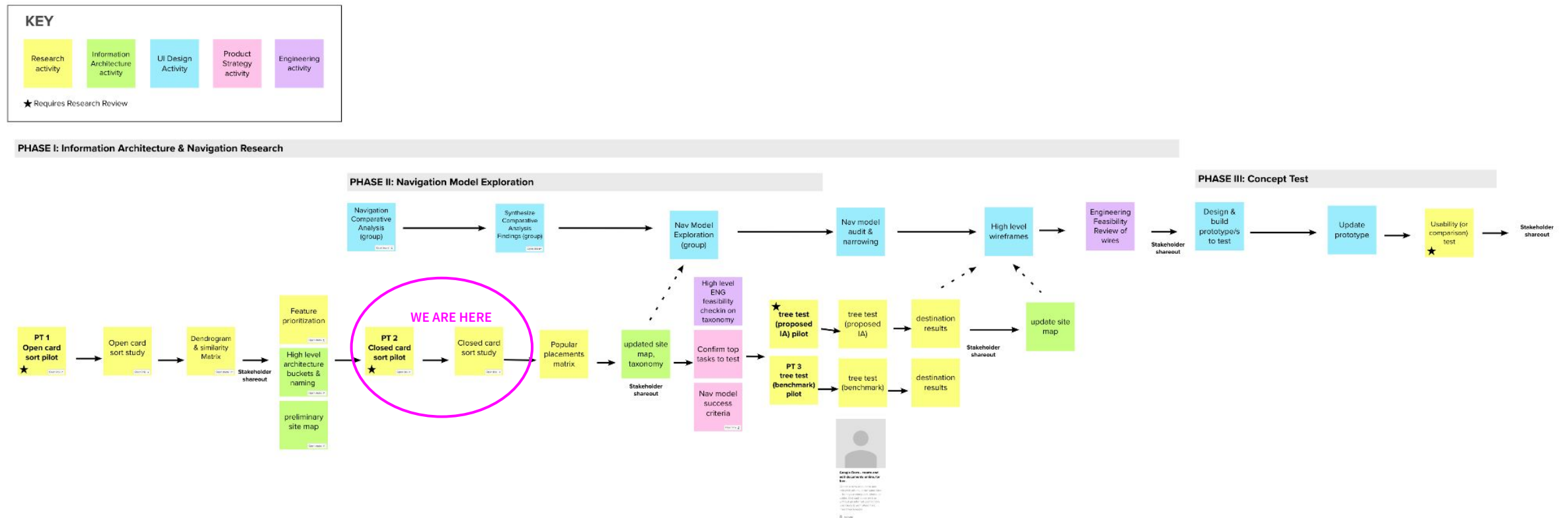
Resources:

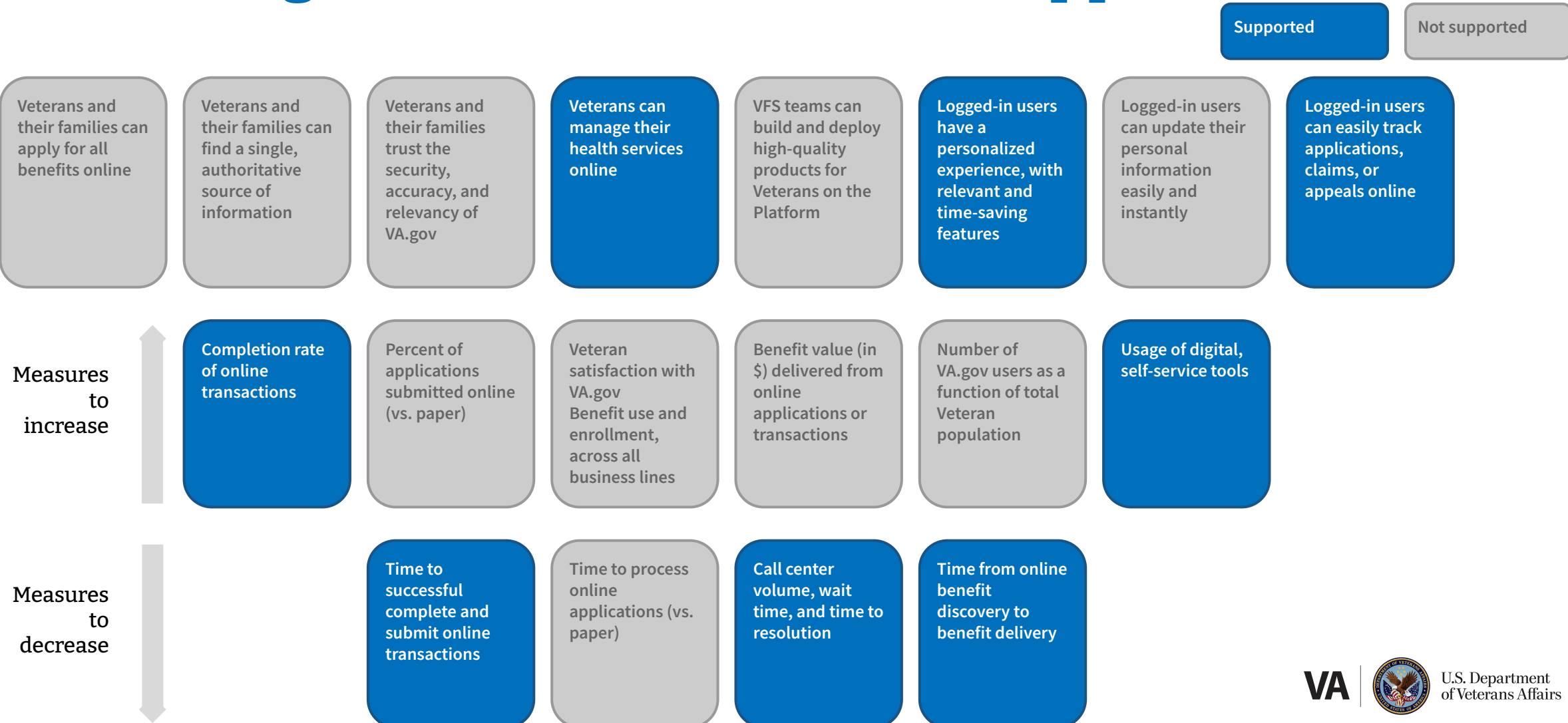VA Mobile App: Information Architecture & Navigation - High Level Project Summary

How this research maps to the Veteran journey

- **Taking care of myself**
- Reinventing myself
- Putting down roots
- Retiring

Reinventing myself

Taking care of myself

Putting down roots

Joining

Serving

Getting out

Starting up

Retiring

Aging

Dying

For a fully detailed Veteran journey, go to
https://github.com/department-of-Veterans-affairs/va.gov-team/blob/master/platform/design/va-product-journey-maps/Veteran%20Journey%20Map.pdf

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Serving and separation

Living civilian life

Retiring and aging

OCTO-DE goals that this research supports

Supported	Not supported

| Veterans and their families can apply for all benefits online | Veterans and their families can find a single, authoritative source of information | Veterans and their families trust the security, accuracy, and relevancy of VA.gov | **Veterans can manage their health services online** | VFS teams can build and deploy high-quality products for Veterans on the Platform | **Logged-in users have a personalized experience, with relevant and time-saving features** | Logged-in users can update their personal information easily and instantly | **Logged-in users can easily track applications, claims, or appeals online** |

Measures to increase

| **Completion rate of online transactions** | Percent of applications submitted online (vs. paper) | Veteran satisfaction with VA.gov Benefit use and enrollment, across all business lines | Benefit value (in $) delivered from online applications or transactions | Number of VA.gov users as a function of total Veteran population | **Usage of digital, self-service tools** |

Measures to decrease

| **Time to successful complete and submit online transactions** | Time to process online applications (vs. paper) | **Call center volume, wait time, and time to resolution** | **Time from online benefit discovery to benefit delivery** |

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Research Questions & Method

Research questions

1. **How do Veterans think about the current and proposed pieces of content on the VA Mobile app?**

    a. Do participants understand the proposed categories?

    b. Are there any cards that participants felt uncertain about what category to place them in?

    c. Are there any categories missing?

2. **Does previous experience with the VA mobile app affect Veteran mental models as they relate to the VA Mobile app?**

    a. If yes, in what way?

Research Plan for VA Mobile App Information Architecture Research: Closed Card Sort (part 2 of 3)

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Method & recruiting

Unmoderated Closed Card Sort

46 participants took part in a closed card sort using Optimal Sort, an asynchronous, web-based card sorting platform.

They represent:

- Diversity across age groups
- Diversity across racial identities
- Diversity across education levels
- Diversity across rural and metropolitan areas
- More than 10 women

All used a desktop computer.

Participant demographics

Findings may not include the perspectives of the following underserved Veteran groups:

- Veterans who have a **cognitive disability**
- Veterans who **don't have a degree**
- Veterans who identify as **Latinx, Asian, Native, or LGBTQ+**
- Veterans who **live abroad**
- **Other than honorable**
- **Assistive technology users**
- Veterans who **use mobile exclusively**

We recommend studies with these underserved groups in the future.

Cards tested in sort (36)

Existing app features:

1. biometric sign on setting
2. claim status
3. contact the VA
4. COVID-19 updates & information
5. disability rating
6. find a VA location
7. list of medical appointments
8. manage direct deposit
9. military information
10. notification settings
11. personal and contact information
12. privacy policy
13. secure messaging
14. VA letter and documents
15. view direct deposit payment history
16. sign out
17. share the app

Proposed/Future features:

1. disability compensation
2. education payments
3. GI bill balance
4. health record
5. join a video appointment
6. labs and tests
7. list of prescriptions
8. make a doctor appointment
9. manage dependents
10. transfer GI bill dependents
11. patient check-in
12. pay back your overpayments
13. pay your health care copay
14. pension payments
15. prescription refill request
16. schedule an immunization appointment
17. travel expense reimbursement
18. vaccine records
19. Veteran ID card

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Card sort categories

Platform constraints, future business goals & card sort testing requirements informed our provided categories.

Current VA.gov Category Names	Current App Category Names	Closed Card Sort App Category Names
Health Care	**Health**	**Health**
● Disability > Claims and appeals ● Education and training ● Records	**Claims** (disability claims only)	**Benefits**
N/A (payment-related info is spread out across all categories)	**N/A** (payment info is located in Profile)	**Payments**
● MyVA > Profile	**Profile** (also includes Records, Payments, App Settings information)	**Account**
● Find a VA Location ● Contact Us ● VA COVID-19 Updates ● Privacy Policy	**Home**	**General VA Info***

We used description text instead of section labels listed here in the card sort for clarity purposes. We also allowed participants to create their own groups.

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Findings

tl;dr: **Overall, participants grouped cards in similar ways, and the categories they created contained the same core groups of cards.** In a small subset of cards, there was greater variation around category placement.

Hypothesis: Intended category groupings tested

Category recommendations for top-level navigation (based on open card sort findings, related desk research & grouping/naming activity):

Health (no change)	Benefits (Claims)	Payments (New!)	Account (Profile)	General VA Info (Home)
→ COVID-19 updates & information → vaccine records → make a doctor appointment → list of medical appointments → secure messaging → prescription refill request → schedule an immunization appointment → patient check-in → health record → join a video appointment → labs and tests → list of prescriptions	→ claim status → VA letters and documents → GI bill balance → transfer GI bill dependents	→ disability compensation → education payments → view direct deposit payment history → manage direct deposit → pay your health care copay → pay back your overpayments → pension payments → travel expense reimbursement	→ disability rating → Veteran ID card → military information → personal and contact information → manage dependents → biometric sign on setting → notification settings → sign out → share this app	→ contact the VA → find a VA location → privacy policy

We used description text instead of section labels listed here in the card sort for clarity purposes.

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Key findings: Participant category results

With a few exceptions, participants agreed where cards should be sorted. They also sorted the cards into the categories we predicted:

Health (no change)	Benefits (Claims)	Payments (New!)	Account (Profile)	General VA Info (Home)
➜ *COVID-19 updates & information* ➜ vaccine records ➜ make a doctor appointment ➜ list of medical appointments ➜ secure messaging ➜ prescription refill request ➜ schedule an immunization appointment ➜ patient check-in ➜ health record ➜ join a video appointment ➜ labs and tests ➜ list of prescriptions	➜ claim status ➜ *VA letters and documents* ➜ GI bill balance ➜ transfer GI bill dependents ➜ **disability rating** ➜ **manage dependents**	➜ disability compensation ➜ education payments ➜ view direct deposit payment history ➜ manage direct deposit ➜ pay your health care copay ➜ pay back your overpayments ➜ pension payments ➜ travel expense reimbursement	➜ ~~disability rating~~ ➜ Veteran ID card ➜ military information ➜ personal and contact information ➜ ~~manage dependents~~ ➜ biometric sign on setting ➜ notification settings ➜ *sign out* ➜ *share this app* ➜ *VA letters and documents*	➜ contact the VA ➜ find a VA location ➜ privacy policy ➜ **share this app** ➜ **COVID-19 updates & information** ➜ *sign out*

Cards that were sorted into a different category than we expected are indicated above in **bold, orange text.** Cards that were sorted at least 30% into a second category appear in *italics*.
See Standardization grid for detailed table of categories

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Key findings: Card agreement rate by category

Participants agreed on which categories to place the majority of cards, with 20 out of 36 cards having very high agreement (33 had "high" agreement or greater).

Health (no change)	Benefits (Claims)	Payments (New!)	Account (Profile)	General VA Info (Home)
→ **vaccine records** → **make a doctor appointment** → **list of medical appointments** → **secure messaging** → **prescription refill request** → **schedule an immunization appointment** → **patient check-in** → **health record** → **join a video appointment** → **labs and tests** → **list of prescriptions**	→ claim status → GI bill balance → transfer GI bill dependents → disability rating → manage dependents	→ **pay back your overpayments** → **pay your health care copay** → **view direct deposit payment history** → manage direct deposit → disability compensation → pension payments → travel expense reimbursement → education payments	→ **Veteran ID card** → **personal and contact information** → **biometric sign on setting** → military information → notification settings → sign out → share this app → VA letters and documents	→ **contact the VA** → **find a VA location** → **privacy policy** → share this app → sign out → COVID-19 updates & information

Agreement = % of the time that a card was sorted into a category

Very High Agreement (>78%/35.88) **20 cards**

High Agreement that a card belongs in a category (>60%/27.6) **13 cards**

Lower Agreement that a card belongs in a category (<60%) **3 cards**

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Key findings: Categorization of cards

Only a few participants created new categories

- 7 out of 46 participants created new categories
- The most common new category created was Education (3).
- Other categories created: This App (1), VA Letters & Documents (1), Other (1), Computer/Cloud Documents (1)

The new Payments category performed well

- Despite the fact that a consolidated category does not yet exist on VA.gov, the majority of participants sorted payment-related cards into the new Payments category.

See **Standardization grid** for detailed table of cards & categories

Key findings: Categorization of cards (cont.)

Previous use of the VA Mobile app seemed to affect the way participants sorted cards.

19 participants who reported that they were **VA Mobile App users** grouped the cards in similar ways.
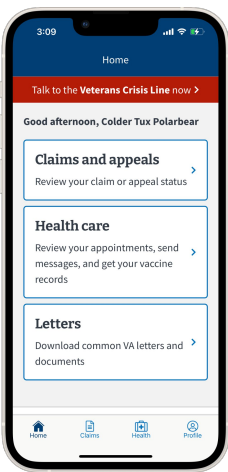
Health	Very High	
Benefits	High	Very High
Payments	High	Very High
Account	High	Very High
General info	High	Very High

27 participants who reported that they were **not VA Mobile app users**, grouped the cards in a variety of different ways.
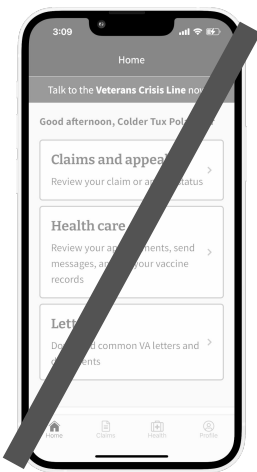
Health	Very High	
Benefits	low	High
Payments	low	High
Account	low	High	Very High
General info	low	High	Very High

Key (Agreement %): | 50% or less | 60% + | 78% + |

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Key findings: Comprehension

- **Nearly all** participants (42 of 46) reported that they **understood the proposed categories**

- **More than half** of participants (25) reported that they **felt uncertain about where to place one or more cards** (21 participants said they did not):
  - **7 participants mentioned uncertainty around Benefits**
    - "Benefits, because almost everything fit somewhere else…" **P7**
    - "I felt uncertain about finding balance for benefits." **P6**
  - **7 participants mentioned Payments**
    - "Payments to and from; documents, etc. establishing veteran status…" **P14**
  - **6 participants mentioned a need for subcategories**
    - "…excessive number of cards in health and benefits without the ability to subcategorize…" **P14**
    - "I would want separate benefits tabs… one for education benefits and one for disability benefits" **P23**
  - **2 participants mentioned Account**
    - "Anything with "MY" or my family status should be accessible in My personal account" **P#1**

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Recommendations

Recommendations

Overall, participants grouped cards in similar ways—the categories they created contained the same core groups of cards. In a small subset of cards, there was greater variation around category placement.

Because these core groups were strong, we recommend moving forward with a Tree Test.

What is a Tree Test and what can we learn from it?

Recommendations (cont.)

We recommend the following changes to improve clarity between categories and better match participants' mental models:

Health
- Keep category name & contents as proposed.
- Explore adding subcategories in tree test taxonomy.

Payments
- Keep category name (could also consider an alternate label, 'Money?' if Payments doesn't feel inclusive enough of both payments and debts); keep other content as proposed.
- Move 'Manage direct deposit' into this category.

Benefits
- Keep the category name, explore adding subcategories (Education and training, Disability claims and appeals) in taxonomy to address extensibility (allowing the app to grow in terms of benefit-related feature set).
- Move 'disability rating' and 'manage dependents' into this category.

~~Account~~ **Profile**
- Because it was a 'catchall' category for some participants, we recommend returning to "Profile" to better distinguish from Benefits category ("Account" label may be too general), explore adding subcategories in tree test taxonomy.
- Move 'VA letters & documents' into this category

~~General VA Info~~ **N/A**
- Because it was a 'catchall' category for some participants, we recommend that we consider renaming this category or dropping it altogether and having items live on Home (as they do currently).
- Consider moving 'Share this app' into this category.

Recommendations (cont.)

Category recommendations for top-level navigation in Tree Test (updated based on closed card sort findings and business goals):

Health (no change)	Benefits (Claims)	Payments (New!)	Profile	N/A (Home)
➔ *COVID-19 updates & information* ➔ vaccine records ➔ make a doctor appointment ➔ list of medical appointments ➔ secure messaging ➔ prescription refill request ➔ schedule an immunization appointment ➔ patient check-in ➔ health record ➔ join a video appointment ➔ labs and tests ➔ list of prescriptions	➔ claim status ➔ *VA letters and documents* ➔ GI bill balance ➔ transfer GI bill dependents ➔ **disability rating** ➔ **manage dependents**	➔ disability compensation ➔ education payments ➔ view direct deposit payment history ➔ manage direct deposit ➔ pay your health care copay ➔ Pay back your overpayments ➔ pension payments ➔ travel expense reimbursement	➔ Veteran ID card ➔ military information ➔ personal and contact information ➔ **VA letters and documents** ➔ sign out ➔ biometric sign on setting ➔ notification settings ➔ privacy policy ➔ **share this app**	➔ contact the VA ➔ find a VA location ➔ **COVID-19 updates & information**

Changes based on closed card sort findings are indicated in **orange**.

What is a Tree Test and what can we learn from it?

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Recommendations (cont.)

- As of 3/16/22, 'COVID-19 updates' isn't on the VA.gov home page (but is still accessible via search, and vaccine information is included in the Health section)—we recommend following their lead in terms of including it on the homescreen.

- Based on the difference in mental models participants had around some cards, we recommend considering onboarding or cross-references to address the gap.

- Consider testing the findability of items in the current VA Mobile app's IA using TreeJack to set a benchmark before testing the findability of items in the proposed IA.

Questions & Discussion

Next steps

Next steps

- **Phase I: IA Research Track**
  - **Taxonomy & sitemap update**
    - Update proposed taxonomy & app sitemap based on closed card sort findings
    - Review taxonomy with ENG for feasibility
    - Review proposed taxonomy & app sitemap with stakeholders (meeting TBD)
  - **Tree Testing (Current vs New IA)**
    - Stakeholders approve **key tasks** to test
    - **Prep for Benchmark** study of examining findability of key tasks in VA Mobile app's **current IA**
    - Prep for study examining findability of key tasks in VA Mobile app's **proposed IA**
- **Phase II: Navigation Exploration Track**
  - Share results of [navigation UI pattern comparative analysis](#)
  - Stakeholders confirm navigation model **success criteria** (meeting TBD)
  - Designers explore navigation models (wireframes)
  - Conduct navigation model audit & narrowing based on criteria

Tree Testing: Top Tasks for Approval

Tasks should cover all IA categories, represent both easy tasks and cards/tasks that were most confusing to users. Test should be limited to 8-10 tasks.

Section	Task
Current IA: Claims New IA: Benefits	Check the status of your disability claim
Payments & Health	Find out how much you owe for a medical copay
Current IA: Profile, Home New IA: Profile & Benefits	Locate an official letter indicating Veteran status
Payments & Benefits	Review balance of education funds remaining to you
Current & New IA: Profile	Update home address
Benefits	View benefit summary
Current & New IA: Health	Send a secure message
Current & New IA: Health	View appointments

Lean User Research & IA Process

Next steps: Prep for card sorts & navigation model audit

Last updated 3/18/2022
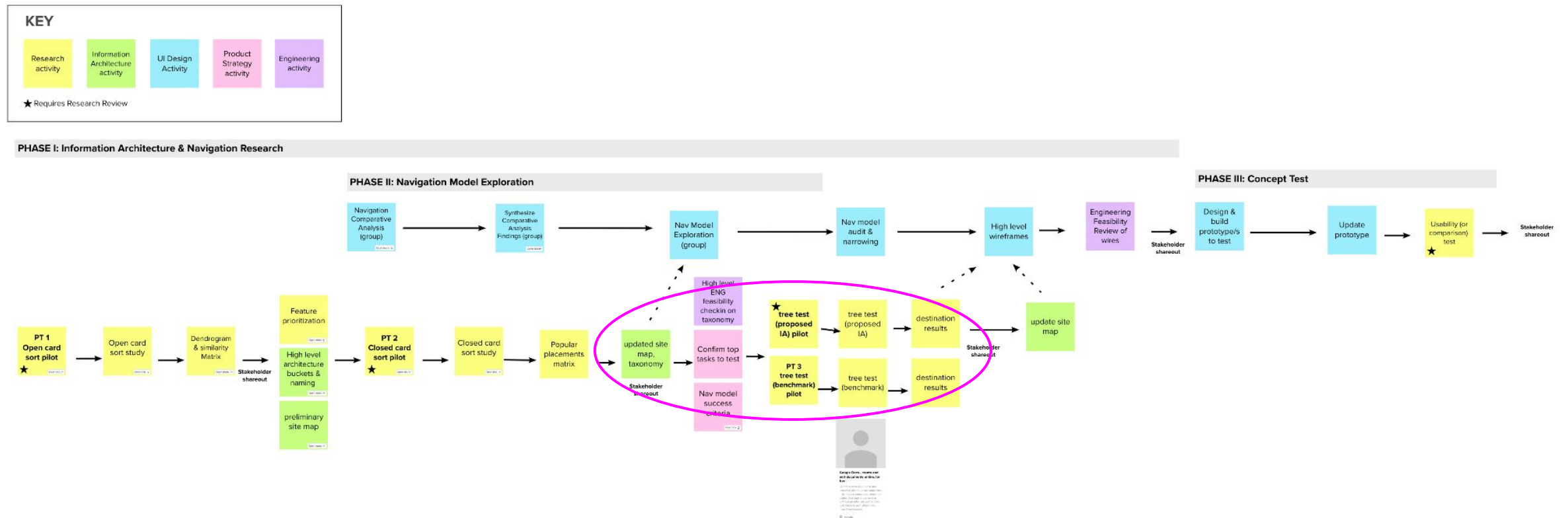
Thanks!

Questions?

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Appendix

Research questions, answered

- **How do Veterans think about the current and proposed pieces of content on the VA Mobile app?**

  - **Participants agreed on which categories to place the majority of cards**, with 33 out of 36 cards having at least "high" agreement in a single category among participants (20 had "very high" agreement)
    - A few cards had **lower agreement** among participants (fewer than 60% sorted them into the same category):
      - **Education reimbursements** from the VA (58% in Payments, 26% in Benefits, 8% in Account, 6% in Education)
      - **COVID-19 updates & information** (54% in General VA Info, 39% in Health, 2% in Account, 2% in Benefits, 1% N/S)
      - **VA letters and documents** (nearly even split of 43% in Benefits & 48% in General VA Info, 4% in General VA info, 4% in VA letters & documents
  - **However, categories created by participants varied & there was some overlap between categories.**
    - **Health** was the strongest category, with most participants agreeing on the exact contents.
    - The new **Payments** category had fair agreement among participants
    - Cards within **Payments, Account, Benefits, and General VA Info** had high or very agreement.
      - Participants sorted 33 different cards into Account, 22 different cards into General VA Info and 20 different cards into Benefits).
      - There was also **overlap** in the cards sorted into the **Benefits**, **Account** & **Payments** categories.
      - Some participants also expressed uncertainty about these categories in our questionnaire.

Research questions, answered (cont.)

- **Do Veterans understand the proposed categories?**
  - **Yes.** Nearly all participants (42 of 46) reported that they understood the proposed categories

- **Are there any cards that Veterans felt uncertain about what category to place them in?**
  - **Yes.** More than half of participants (25) reported that they felt uncertain about where to place one or more cards (21 participants said they did not).

    - 7 participants mentioned **Benefits**
      - "Benefits, because almost everything fit somewhere else…" **P7**
      - "I felt uncertain about finding balance for benefits." **P6**
    - 7 participants mentioned **Payments**
      - "Payments to and from; documents, etc. establishing veteran status…" **P14**
    - 6 participants mentioned a **need for subcategories**
      - "…excessive number of cards in health and benefits without the ability to subcategorize…" **P14**
      - "I would want separate benefits tabs… one for education benefits and one for disability benefits" **P23**
    - 2 participants mentioned **Account**
      - Anything with "MY" or my family status should be accessible in My personal account

Research questions, answered (cont.)

- **Are there any categories missing?**
  - **Mostly no.**
    - 5 out of 46 participants created new categories
    - The most common new category created was Education (3)
    - Other categories created: This App (1), VA Letters & Documents (1), Other (1), Computer/Cloud Documents (1)

- **Does previous experience with the VA mobile app affect veteran mental models as they relate to the VA Mobile app?**
  - **Yes.** 19 out of 46 participants reported they had used the VA Mobile app, 27 reported they had not. Previous use of the VA Mobile app seemed to affect the way participants sorted cards. VA Mobile app users sorted their cards in a similar way

Mostly Closed Card Sort - Standardization Grid

Standardization grid ⓘ

Total participants 0 ————————————————— 46

Name	Account	Benefits	Education	General ...	Health	Payments	VA Letter...	Not standardized
Access letters and documents	22	20		2			2	
COVID-19 updates & informat	1	1		25	18			1
Check the status of a disability	8	35		2	1			
Check your disability rating	9	33		2		1	1	
Check-in for your doctor appo		1			45			
Contact the VA	1			45				
Find a VA location	2			44				
Join a virtual doctor appointm		1			45			
Make a doctor appointment	1			2	43			
Manage the dependents bene	15	29				2		
Manage the types of notificati	34			12				
Manage your direct deposit in	15			1		30		
Message your healthcare prov	4				42			
Pay your health care copay	4			1	5	36		
Repay money you owe the VA	5			2		39		
Request a prescription refill	2				44			
Review a list of your prescribe	1				44	1		
Review balance of education	7	31	3			5		
Review pension payments the	9	4				33		
Review privacy policy	7			38				1
Review reimbursements the V	4	12	3			27		
Review the history of disability	6	10				30		
Review your digital Veteran ID	36	5		4			1	
Review your direct deposit pa	4	3				39		
Review your health record	1	1		1	43			
Review your history of vaccina	1			1	44			
Review your labs and test res					46			
Review your past & upcoming	1			1	44			
Review your personal informa	43	1		2				
Schedule a vaccination appoi	1			2	43			
Share the app	14	1		30				1
Sign Out of the app	28			17				1
Submit a travel expense reimb	7	7			1	30		1
Transfer GI bill dependents	10	32	3			1		
Turn on/off the ability to sign i	40	1		5				
Your branch and period of mil	34	5		5	1		1	

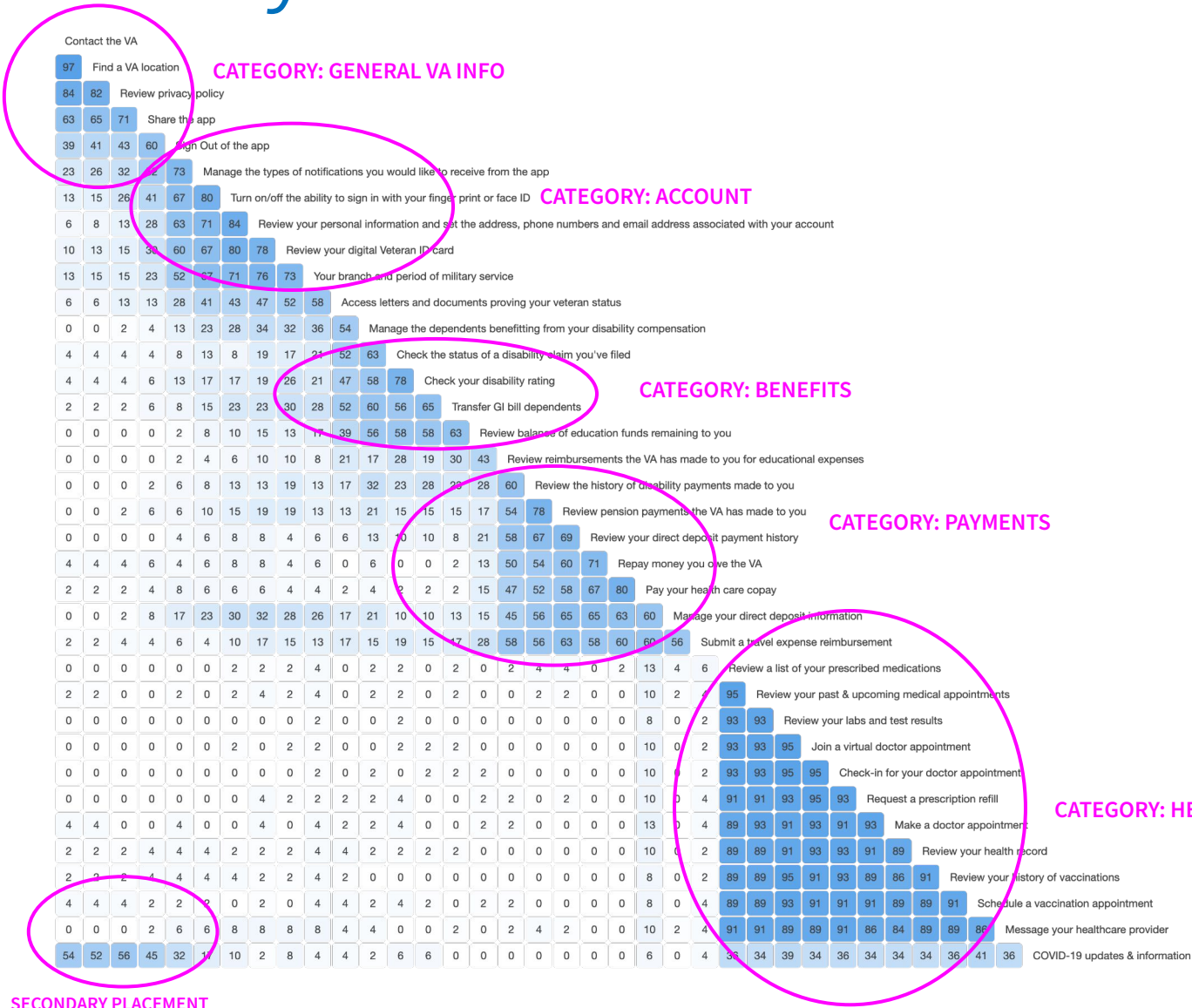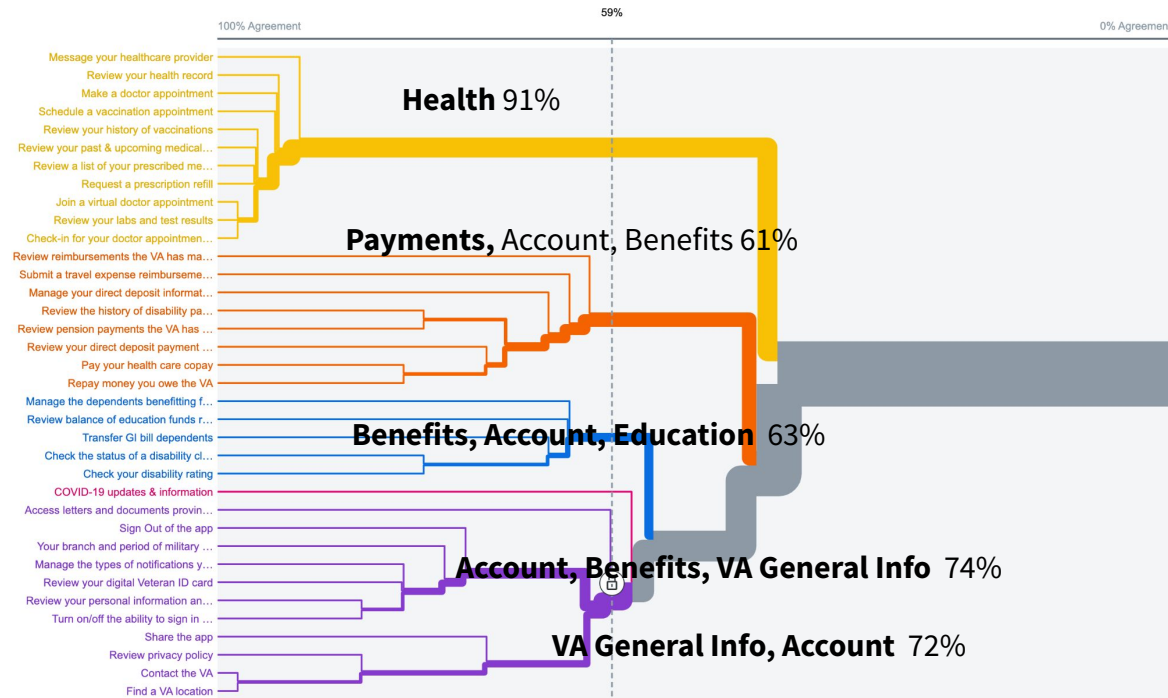|	
Dark Blue = Very High Agreement (78% or above/35.88)	20 cards
Medium Blue = High Agreement 60% or above/27.6)	13 cards
Light Blue = Lower Agreement (less than 60%/27.6)	3 cards

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Mostly Closed Card Sort - Similarity Matrix

Contact the VA
Find a VA location
Review privacy policy
Share the app
Sign Out of the app
Manage the types of notifications you would like to receive from the app
Turn on/off the ability to sign in with your finger print or face ID
Review your personal information and set the address, phone numbers and email address associated with your account
Review your digital Veteran ID card
Your branch and period of military service
Access letters and documents proving your veteran status
Manage the dependents benefitting from your disability compensation
Check the status of a disability claim you've filed
Check your disability rating
Transfer GI bill dependents
Review balance of education funds remaining to you
Review reimbursements the VA has made to you for educational expenses
Review the history of disability payments made to you
Review pension payments the VA has made to you
Review your direct deposit payment history
Repay money you owe the VA
Pay your health care copay
Manage your direct deposit information
Submit a travel expense reimbursement
Review a list of your prescribed medications
Review your past & upcoming medical appointments
Review your labs and test results
Join a virtual doctor appointment
Check-in for your doctor appointment
Request a prescription refill
Make a doctor appointment
Review your health record
Review your history of vaccinations
Schedule a vaccination appointment
Message your healthcare provider
COVID-19 updates & information

CATEGORY: GENERAL VA INFO
CATEGORY: ACCOUNT
CATEGORY: BENEFITS
CATEGORY: PAYMENTS
CATEGORY: HEALTH
SECONDARY PLACEMENT

Mostly Closed Card Sort - Dendrograms

Best Merge Method
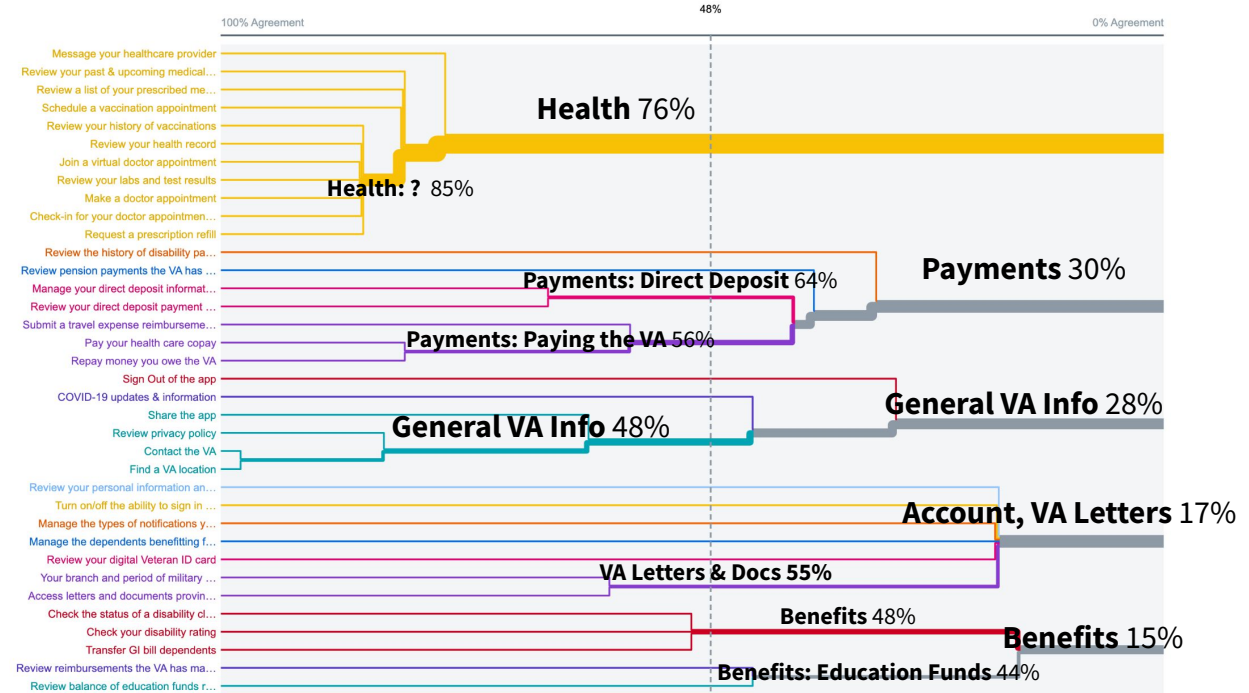
Actual Agreement Method

Questionnaire - Detailed Responses

Which cards did you feel uncertain about?

Payments

wanted sub categories

Benefits

Health

confused about mobile app mention

account

dependents

Payments to and from

Benefit related questions. I want separate categories for different benefit types.

Benefits and payments I hesitated a little. Maybe need smaller sub-categories.

medication refill or lab results.

Apps question

Account

Transferring GI Bill benefits to dependents - really didn't know what section that should go to. I almost feel like there should be a section "dependents" that goes over all of that. It could also include CHAMPVA info (dependent healthcare) and how to get replacement CHAMPVA cards. That is an absolute nightmare to try and figure out within the VA, having just done it.

The payments and benefits almost seemed to overlap

medical-needs sub category.

Benefits, because almost everything fit somewhere else so i wanted to be sure of the right place for things.

excessive number of cards in health and benefits without the ability to sub-categorize

The one new discussing an app.

anything with "MY" or my family status should be accessible in My personal account

managing dependents

co-payment record of payments received

excessive number of cards in health and benefits without the ability to sub-categorize

Benefit related questions. I want separate categories for different benefit types.

medical-needs sub category.

Signing in and out if the app

Payments

Most of them. It seemed there needed to be subcategories for each.

Some I felt could be under benefits or my account

GI bill benefits

Payments

Benefits and payments I hesitated a little. Maybe need smaller sub-categories.

benefits and account could overlap.

disability claim status

?

Travel reimbursement

All of them for they do not outline where one would find them in the real world. Making an appointment can be done by phone in my Health Benefits App on your phone. You need to use real titles. Benefits can be found via your vcineontfc on line or at your local VSO which he/she will look in the computer of this generation had too generic (needs to be separated or more in depth technical)

finding balance for benefits.

establishing veteran status

Covid 19 information.

Payments received

Six participants suggested having sub categories would help

The payments and benefits almost seemed to overlap

Seven people mentioned uncertainty about the the payment section

Benefits/ account and payments had crossover. Participants expressed uncertainty about these categories

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Key findings: Mobile app user vs (non mobile app user) categories

Veterans did not categorize cards in a similar manner to how they are organized on VA.gov.

Health (no change)	Benefits (New!)	Payments (New!)	Account (Profile)	General VA Info* (Home)
→ COVID-19 updates & information → **vaccine records** → **make a doctor appointment** → **list of medical appointments** → **secure messaging** → **prescription refill request** → **schedule an immunization appointment** → patient check-in → **health record** → join a video appointment → **labs and tests** → **list of prescriptions**	→ **claim status** → **VA letters and documents** → **GI bill balance** → **transfer GI bill dependents**	→ **disability compensation** → **education payments** → **view direct deposit payment history** → **manage direct deposit** → **pay your health care copay** → Pay back your overpayments → pension payments → **travel expense reimbursement**	→ **disability rating** → **Veteran ID card** → **military information** → **personal and contact information** → manage dependents → biometric sign on setting → **notification settings** → sign out → share this app	→ contact the VA → find a VA location → privacy policy

VA.gov category:
Health care
Education
Disability

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Tree Test

What is a Tree Test?

The tree test will test our hierarchical category structure by having users find the locations where specific tasks can be completed.

Tree testing is incredibly useful as a follow-up to card sorting because it:

- Evaluates a hierarchy according to **how it performs in a real-world scenario**, using tasks similar to a usability test; and
- Can be **conducted well in advance** of designing page layouts or navigation menus, **allowing inexpensive exploration and refinement** of the menu categories and labels.
- Can be used later to give us a **clear, quantifiable benchmark** for us to improve on in future taxonomy iterations (If we test our first tree with 8 tasks, and then test revised our tree with the same 8 tasks, we'll be able to pinpoint exactly how our changes have improved the **findability of our information**).

Tree Testing 101

What questions does a Tree Test answer?

Tree testing helps us understand:

- How many people **completed the task** successfully?

- Of those who were unsuccessful, **what information did they select instead**?

- Did people go **straight to an answer**, or did they have to move back up the tree?

- Exactly **which path did people take** before they selected an answer?

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Example task in Treejack

"How would you find out the Acme company's mailing address?"

Participants would see this on the tree like this:
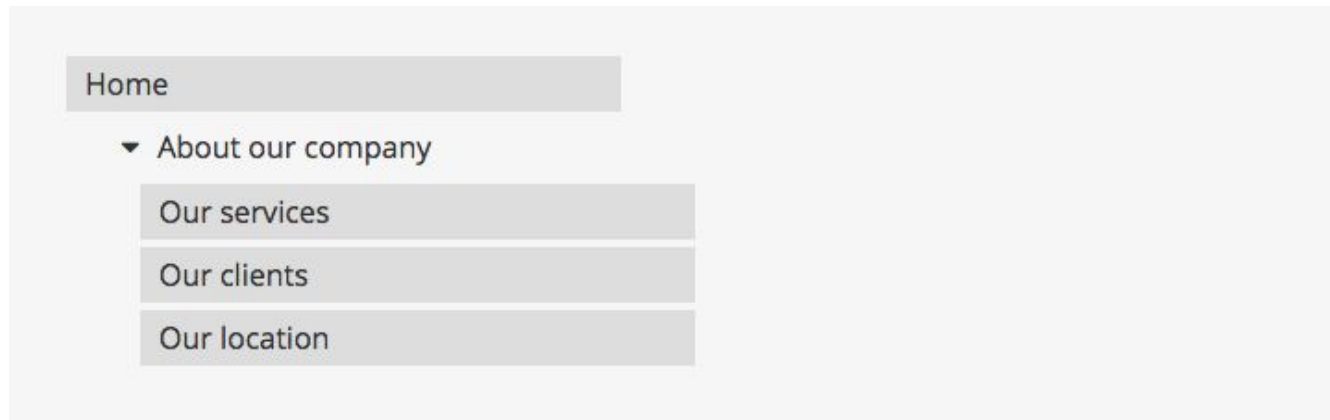
And they would click through the tree until they could select 'Our location' to complete the task successfully:

Tree Test #1 (Proposed IA): Scope

- **What will we test:** The proposed taxonomy for the VA Mobile app, informed by two rounds of card sorts.* Test should cover all categories & represent both easy tasks and cards/tasks that were most confusing to users, limited to 8-10 tasks.

- **Why are we testing:** We are testing the findability of tasks within our proposed IA—we want to see if our new categories and labels are intuitive for users.

We can also iterate with future tests. If we have some strong competing ideas, we can test multiple versions. We can also conduct additional tree tests in the future, as we expand the functionality of the VA Mobile app.

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Tree Test #2 (Current app IA): Scope

- **What will we test:** The existing taxonomy for the VA Mobile app. We will reuse the tasks we are planning for the proposed app IA tree test (limited to those that are relevant in the current app).

- **Why are we testing:** We are testing the findability of tasks within our current IA in order to set a benchmark.

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Tree Testing: Top Tasks for Approval

Tasks should cover all IA categories, represent both easy tasks and cards/tasks that were most confusing to users. Test should be limited to 8-10 tasks.

Section	Task
Current IA: Claims New IA: Benefits	Check the status of your disability claim
Payments & Health	Find out how much you owe for a medical copay
Current IA: Profile, Home New IA: Profile & Benefits	Locate an official letter indicating Veteran status
Payments & Benefits	Review balance of education funds remaining to you
Current & New IA: Profile	Update home address
Benefits	View benefit summary
Current & New IA: Health	Send a secure message
Current & New IA: Health	View appointments