**Research Plan for Design, FormFinder, Usability Testing, 2024-05**

*(For internal reference only – https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/platform/research/research-plan-template.md)*

***Background***

**What is the problem you need to solve?**

Veterans have a hard time finding forms when they need them to make changes to account including enrollment, changes to personal information, accessing benefits, and other actions supported by VA.

**How do you think this problem could be solved?**

By making forms more accessible, findable, and easily used by the diverse group of customers the VA serves.

**What is Veterans’ familiarity with this tool? Is this a new product or an iteration on an existing one?**

Veterans are not familiar with this tool – it is a new system called FormFinder intended to help Veterans correctly discover and download PDF-based forms.

***OCTO Priorities***

**Which OCTO priorities does this research support?**

1. Our digital experiences are the best way to access VA health care benefits
2. Our platforms are the best way to deliver product at VA

***Veteran Journey (tentative)***

**Where does your product fit into the**[**Veteran journey**](https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/platform/design/va-product-journey-maps/Veteran%20Journey%20Map.pdf)**? Are there moments that matter?**

Transition from active-duty military service to non-active duty. (within 1-2 years of separation) Including:

* Starting up
  1. MTM: finding something to do: school, work, community purpose
  2. Navigating health care options for self and family
  3. Understanding service-connected disability ratings and eligibility
* Taking care of myself
  1. MTM: Managing mental-health
  2. Managing chronic health issues and and finding resources
* Reinventing myself
  1. MTM: Finding work and purpose
  2. Transferring skills from military service to jobs in civilian life

***Research Goals***

**What are we trying to learn from this research?**

*(preliminary goals)*

Get Veteran, family member, and/or caregiver feedback on:

1. Existing prompts used in the prototype and identify additional prompts
2. Impressions of tool
3. Usability of solution: functionality
4. Content clarity, relevance and tone
5. What Peer programs are useful and how they’d like to access in their community
6. Is there anything missing from the solution that would make it stronger?
7. Should record metrics on completion rate
8. Should record metrics on time spent
9. Should make recommendations in a must, should, could severity.
   1. Must fix: Cannot complete task or worsens the user experience.
   2. Should fix: Fix addresses some area that does not meet VA guidelines
   3. Could fix: Opportunities for improvement

***Outcome***

**How will this research advance your product to the next phase in the design process? What will you do with your learnings?**

Learnings from usability testing will directly inform next prototype iteration, ensuring the product meets usability standards and provides the best possible user experience for Veterans

***Methodology***

* Moderated usability testing (online) and think-aloud Protocol

***Location***

* Remote through Teams or Zoom
  + Camera on (to see user’s reactions and emotions as they click through prototype)
  + Screen sharing (to properly understand user actions as they click through prototype)
* TBD (via desktop or smartphone)

***Research materials***

* Conversation guide (link)
* Prototype on Figma ([link](https://www.figma.com/proto/er7w2EsZdIHCXxAUrEzy8x/Challenge-Test?page-id=0%3A1&node-id=12-4379&viewport=-609%2C730%2C0.5&t=guyJRXnMAZfmuEPw-1&scaling=scale-down&starting-point-node-id=1%3A1258))

***Recruitment***

**Recruitment approach:**

* **Intended audience:** Veterans, family members and caregivers– all users potentially interacting with FormFinder
* **Recruiting method:** structured recruitment with a screener
* **Recruiting source:** Pool of Veterans recruited through friends and family

*\*(For an actual engagement, would leverage recruiting firms e.g., Perigean, dScout, Respondant.io)*

* \*Leveraginginclusive recruitment through [xxx](https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/teams/vsa/accessibility/research/recruitment.md#maximum-variation-sampling)

**Recruitment criteria:**

* **(N) Veterans:** xxx
* **(N) Caregivers:** xxx
* **(N) Family members:** xxx

***Usability testing session – details***

**Duration:** 30 mins

**Team roles:** 1 interviewer, 1 note-taker, 1 participant

***[EXTERNAL] Conversation Guide***

**Introduction**

Thanks so much for taking time to talk to us today and thank you for your service. My name is *[blank]* and this is *[blank and blank]*.

We are working on a project related to helping Veterans find the resources they need and we appreciate you taking the time to share your valuable input. We’ve created a first version of what this solution would be, and we’d like to spend the next 30min getting your feedback on what we are creating. We will send you a link shortly and ask you to share your screen with us as you click through it and share your thoughts.

**Before we get started, a few housekeeping notes:**

* There are no right or wrong answers, this is not a test. We are researchers here to learn so please be as open and as honest as possible.
* All research findings will be summarized to protect anonymity. Nothing you say will be directly attributed to you.
* The interview should take about 30 min – I'll ask you to share your (or I’ll be sharing my screen) screen to get feedback on some concepts we’re exploring.
* Please “think out loud…” if you could walk us through your thought process that will help us understand how you might use the solution and how to make it better
* We’d like to video record the session for notetaking purposes. All footage is only for **internal use and notetaking**.

Do you have any questions before we get started? Let’s jump in...

Do I have your permission to start recording? ***[start recorder]***

***Getting to know you***

*(Preliminary questions from previous case)*

1. Can you tell us a little bit about yourself? Your experience serving in the military?
2. Tell us about your life now?
3. ~~(If already transitioned) Did you go participate in the Transition Assistance Program (TAP)?~~
4. ~~(If already transitioned) How was transition to civilian life for you? Biggest challenges/surprises?~~
5. ~~(If haven’t transitioned) How are you preparing for transition to civilian life? What are your biggest challenges/concerns?~~
6. Did you (or will you) use VA – are you enrolled?
   * If yes, what services have you used?
   * If no, why not? Do you plan to?

***Usability testing activity – screen sharing & think-aloud protocol***

**Scenario:** ~~Imagine you want to buy a new home and need to provide proof to the lender that you are a Veteran to qualify for a home loan~~

**~~Imagine you are a veteran interested in purchasing a home and have heard that you might be eligible for a VA home loan, which offers favorable terms and rates. To get started, you need to provide proof to the lender and decide to go to the VA website to get the corresponding form~~**

**Imagine you’d like to take advantage of the GI Bill benefit. How would you go about finding the application? Where would you look and how would you search for it?**

**Please share your screen and go to** (link)

*(Ask for: think aloud protocol / Probe for: challenges, workarounds, etc.)*

[FormFinder tool]

* **Landing page**
  + Take a moment to look and read through this screen. What are your initial thoughts?
  + What do you think you’ll be able to do on this site?
* **Search form**
  + [Observe what user does and how they navigate the site]
  + **Keyword/Form Name**
    - What would you expect to get if you searched by Keyword / Form Name? (Probe for: do users understand keyword vs. Form name for search input)
    - Which keyword(s) would you use? Why? (Probe for: type of keywords, single keyword vs. multiple keywords)
  + **English/Spanish:**
    - What do you think this is for? (Probe for: language for the whole site vs. language for the forms)
    - When would you use this? (Probe for: do users want English/Spanish option there?)
* **Results**
  + **Sort by**
    - [Observe if user interacts with, or skips]
    - What would you expect to see for ‘sort by’? (Probe for: criteria)
    - Is there any criteria you would expect to see that is not included here?
    - How often do you use this feature on other websites?
  + **Filters**
    - [Observe if user interacts with, or skips]
    - What would you expect to see under ‘filters’?
    - Is there any filter you would expect to see that is not included here? (Probe for: English/Spanish option as a filter)
* **Search list**
  + Take a moment to read through… is this what you expected to see? How easy can you understand what the document is about?
  + **Clickable content**
    - Where would you click next?
    - What would you expect to see if you click ‘Request…”, “Download…”, ‘Submit…”?
  + What do you think the gray boxes are about?
  + Is there any information missing? (Probe for: what are the priorities for users to see here?)
  + Is there any information irrelevant?
* Looking back at the process, was there anything particularly surprising for you? What?
* Was there anything else particularly challenging? What?
* If you had a **magic wand** and could create the perfect process to find xxx, how would it be?

***Closing***

Thank you so much for your time. Is there anything else that we didn’t cover that you’d like to mention? Do you have any questions for me?

Notes:

Naming

Search terms have the words

Would use search terms

Form name is not useful

Where should I start?

* Home mortgage
* Expect to ask a question

Need to learn more before form --