

***U.S. Department of Veterans Affairs***

***Research plan***

***Research for FormFinder***

***Understand user needs and journey to improve search and form finding process for VA users***

***[INTERNAL] Background***

1. **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.

1. **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.

***OCTO Priorities***

1. Enhance Veterans’ personalized online experience

***Veteran Journey***

Before or after transition from active-duty military service to non-active duty. 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

***[INTERNAL] Research Goals***

Understand Veteran, family member, and/or caregiver needs for accessing forms online.

1. What forms are they looking for? What search terms would they use for finding various forms?
2. Preferences: Language needs, sorting format, naming, sorting & filtering etc.
3. What information do they need to help them fill out the forms?
4. What is the process for finding, filling out, and submitting forms?
5. What are the key moments and pain points of the current system?

***[INTERNAL] Methodology***

* Semi-structured interviews

***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

***[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 support for Veterans and are looking to speak with Veterans (or family members/caregivers) who are looking for forms to use VA services and benefits to learn how you currently find information and forms on va.gov and would like to in the future.

**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.
* The interview should take about 30-45 min
* Please “think out loud…”; I will be screen sharing to show you current process
* We’d like to video record the session for notetaking purposes. All footage is only for **internal use and notetaking**.

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

***Getting to know you***

1. Can you tell us a little bit about yourself? Your experience serving in the military?
2. Tell us about your life now?
3. 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?

***[INTERNAL] Demo ~3 hand-picked scenarios based on user profile and interests demonstrated in screener***

Context: we are designing a tool for Veterans to use to help them locate VA forms required to determine eligibility, apply for benefits, and make changes to their current account. It will be available on the VA website and you wouldn't need to login to use it. Your answers will help us make the tool relevant and useful for other Veterans

* + - 1. We’re going to share the screen with you and walk you through the current process to find forms
      2. Would like to hear your impressions and feedback as we click through.
      3. Follow up questions:
  + What are your overall impressions of landing page?
  + Content: Is the content what you would expect?
    1. Walk is through how you find “x” form
    2. What search terms would you use? What filters? What are key pieces of information you would need to find the forms you’re looking for?
    3. How would you describe the experience? What would you expect?
  + Language and tone: Is the language and tone what you would expect? Is it clear?
  + Usability: do you understand how to use, where to click, questions that can be answered?
  + Would it be useful/helpful? – bucket features Must have, nice to have, not interested
    1. XXXXX
    2. XXXX
    3. XXXX
    4. XXXX
  + What would you change?
  + What would you add?
  + Would you use this tool and what would you use it for? Why or why not.
  + Magic wand – if you had a magic wand, how would you ideally like to find forms on va.gov?

***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? Incentive follow up etc.

NDA