

# Pre-Need Pre-Integration Application (VA Form 40-10007)

Usability Study Readout – MBS Self Service Team

*June 2023*

**VA**



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# Research Goals

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# Research Goals

Pre-Need Pre-Integration Usability Study | June 2023

The goals of this usability study were to assess user reactions to content, IA, and accessibility enhancements for pre-integration, in addition to:

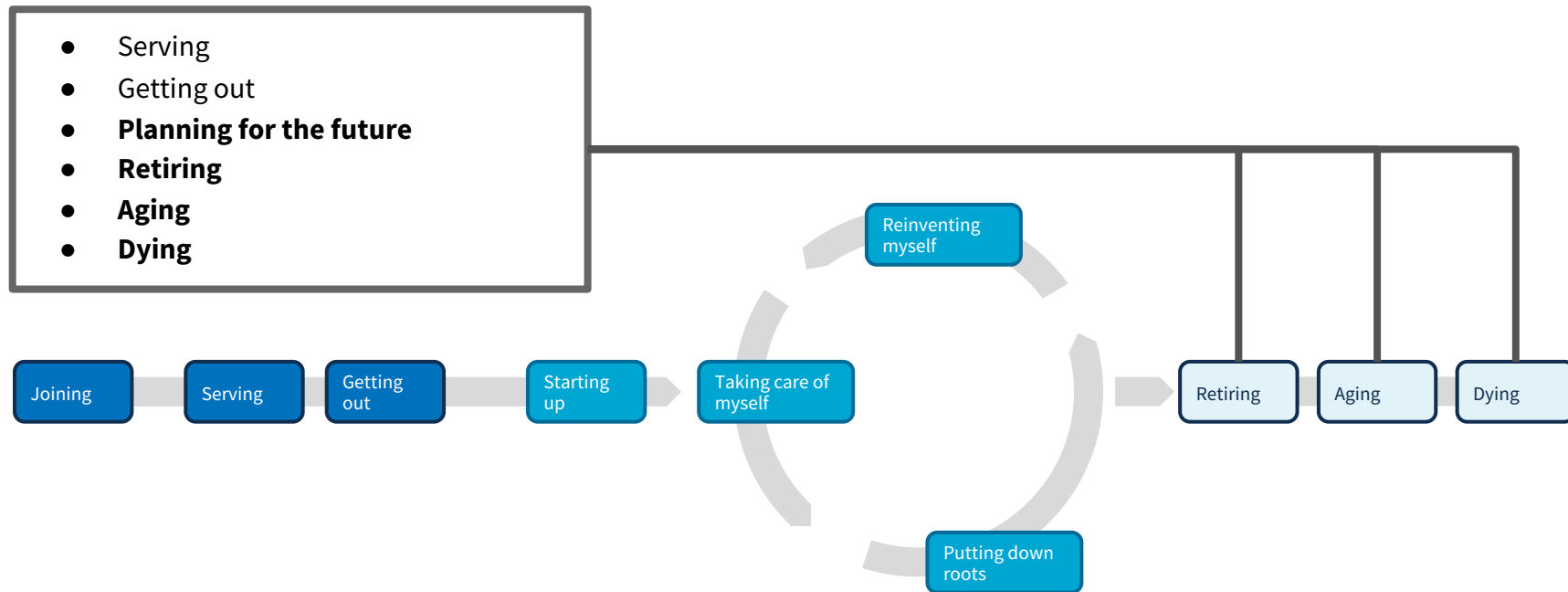
- **Learn how users experience applying for pre-need** to identify improvements that can be made to address usability pain points, address user feedback/concerns, improve the rate of mobile applications, and improve submission rates
- **Understand if the pre-need application is confusing for users** in the entering of their details, as information is collected for up to four people in the form (applicant, sponsor, preparer, previous decedents), and determine which enhancements could mitigate confusion and reduce form entry errors
- **Determine how potentially sensitive content presented to users in the form can be improved** to reduce or eliminate any discomfort users may experience when applying



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# How this research maps to the Veteran journey

Pre-Need Pre-Integration Usability Study | June 2023



For a fully detailed Veteran journey, go to

<https://github.com/departement-of-veterans-affairs/va.gov-team/blob/master/platform/design/va-product-journey-maps/Veteran%20Journey%20Map.pdf>

Serving and separation

Living civilian life

Retiring and aging

VA



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# OCTO-DE goals that this research supports

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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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# Methodology

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# Methodology

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We conducted remote usability testing sessions with Zoom using a clickable, interactive prototype of the Pre-Need Pre-Integration designs.

Participants were given a link to open the prototype that they could navigate through to complete a task assigned to them.

The sessions overall consisted of a combination of tasks and direct questions.

Users were interviewed about their prior Pre-Need knowledge in addition to being asked questions to assess how they experienced the Pre-Need application process during and after task completion.

Notes from the moderator, notetakers, and observers were then synthesized to form findings and recommendations in addition to creating quantitative results.

# Participant Demographics

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12 recruited (2 no-shows), 10 completed sessions:

- 7 males, 3 females
- 6 mobile, 4 desktop
- Ages 37-77 (4 aged 55-64+)
- 7 White or Caucasian, 1 American Indian or Alaskan Native, 1 Hispanic or Latino, 1 prefer not to answer
- 3 Associate's degree, 2 with no degrees, 2 Bachelor's degree, 2 Master's degree, 1 Doctoral degree



# Participant Demographics

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

- Live in rural areas or abroad
- Other than honorable
- Immigrant origin
- Identify as Biracial, Asian, Black, or LGBTQ+
- Have cognitive disabilities or use assistive tech

We recommend studies with these underserved groups in the future.

1	<b>Pre-Need Pre-Integration Usability Study - June 2023</b>																
2	final # of participants	12	# of AT users					# of no shows									
3	Category	%	Target	Study	1	2	3	4	5	6	7	8	9	10	11	12	13
4	<b>Veterans</b>		Based on current VA statistics														
5	<a href="#">Age 55-64+</a>	50.00%	6	5	0	0	0	0	1	0	0	0	1	0	1	1	0
6	<a href="#">Cognitive Disability</a>	50.00%	6	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	<a href="#">Mobile user</a>	50.00%	6	6	1	0	1	0	0	1	0	1	0	1	0	0	0
8	<a href="#">Rural</a>	25.00%	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	<a href="#">No degree</a>	25.00%	3	3	0	1	0	0	0	0	1	0	0	0	0	1	0
10	<a href="#">Other than honorable</a>	21.00%	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0
11	<a href="#">Immigrant origin</a>	17.00%	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	<a href="#">Women</a>	10.00%	2	4	1	1	0	0	0	1	0	0	1	0	0	0	0
13	<a href="#">Expat (living abroad)</a>	0.40%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14																	
15	<b>Race</b>		Based on VA's projected statistics														
16	Black	15.00%	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17	Hispanic	12.00%	2	1	0	0	0	0	0	0	0	0	1	0	0	0	0
18	Biracial	3.90%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
19	Asian	3.00%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
20	Native	0.30%	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0
21																	
22	<b>LGBTQ+</b>		LGBTQ+ Veterans are 5 times as likely to have PTSD														
23	Gay, lesbian, or bisexual	--%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	Transgender	--%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
25	Nonbinary, gender fluid, ge	--%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
26																	
27	<b>Assistive Tech (AT)</b>		Ask an a11y specialist to help you complete this. Targets are for a general AT study.														
28	Beginner AT User	50.00%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
29	Experienced AT User	50.00%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
30	Desktop Screen Reader (SR)	20.00%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
31	Mobile Screen Reader (SR)	20.00%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
32	Magnification/Zoom	20.00%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
33	<a href="#">Speech Input Tech (Siri, Dr</a>	20.00%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
34	Hearing Aids	20.00%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
35	Sighted Keyboard	10.00%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
36	Captions	--%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
37	Switch Device	--%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
38	Braille Reader	--%	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0

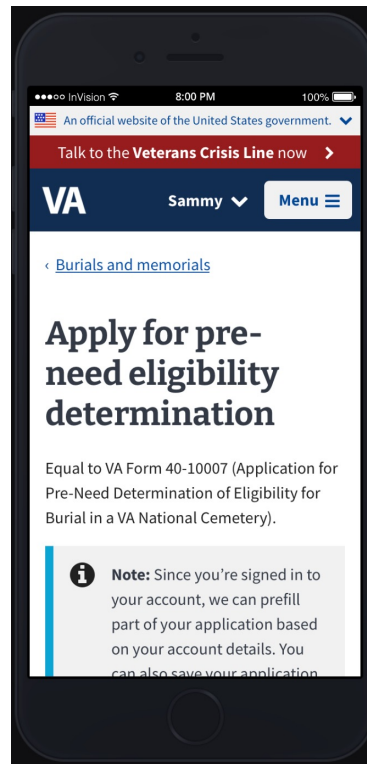
[Participant Tracker on Google Sheets](#)



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# Pre-Need Pre-Integration Prototype

Pre-Need Pre-Integration Usability Study | June 2023



# Key Findings

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# Key Findings

Pre-Need Pre-Integration Usability Study | June 2023

1. Generally, participants **found applying simple and straightforward**
2. Most participants **understood who they were applying for**
3. The majority of participants **understood the various roles** within their application flow
4. While **most participants would be able to upload** supporting documents in PDF format through mobile, some recommended additional file formats be accepted
5. Overall, most participants **didn't express concerns with being asked potentially sensitive questions**, but some felt strongly about having to provide those details
6. When having to select a **desired cemetery for burial, several participants expressed not knowing which to pick**
7. Participants were generally **able to provide applicant or sponsor military details**



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# 1. Generally, participants found applying simple and straightforward

- 10/10 participants were able to complete the pre-need pre-integration application for their specific flow
- 4/10 participants did not wish to fill out optional fields, only the required fields
- 1/10 participants expressed concerns over the length of the application, likely because they were applying for someone else and had prior experience applying for themselves only
- Participants appreciated having their data prefilled throughout the form, and being able to review the application before submitting
- Some participants suggested a checkbox for Sponsor Contact Details to indicate if their address was the same as the Applicant's to allow that to prefill
- One participant recommended additional instructions on Review Application page to help older applicants review their details before submitting

**“It was a piece of cake. It was really easy. It was super easy to figure out what you needed to fill in next [...] It was pretty self-explanatory.” -P10**

**“I thought it was ok. I thought that everything that was asked was necessary. I thought it was pretty easy, too.” -P7**

**"It was pretty easy, pretty seamless. If I had it on my computer, it would have taken me 5 minutes to complete.” -P9**

## 2. Most participants understood who they were applying for

- 9/10 participants were able to determine the applicant's relationship to the service member or Veteran, while 1 participant had some difficulty
- 8/10 participants were able to determine whether they needed to apply for themselves or for someone else
- 2/10 participants had some difficulty assessing who they were applying for (one was applying for themselves as a spouse and one applied for someone else)
- One participant expected the Relationship to Service Member or Veteran question language to change if they were applying for themselves

**Relationship to SM/Veteran Q:**  
“Even at first glance, it’s completely understandable to me.” -P6

**"I'm applying for someone else. So am I the applicant or are they the applicant?" -P8**

**Preparer Q: “I’d assume whether it’s me [applying for self] or if I already passed like my wife or somebody trying to finish it [applying for someone else], I’d assume.” -P9**

## 2. Most participants understood who they were applying for

Are you applying for yourself or for someone else? (\*Required)

- ☐ I'm applying for myself
- ☐ I'm applying for someone else

If you're applying for someone else, who can you sign for? ▼

What is the applicant's relationship to the service member or Veteran? (\*Required)

- ☐ Applicant is the service member or Veteran
- ☐ Spouse or surviving spouse
- ☐ Unmarried adult child
- ☐ Other

What if the applicant is not a service member or Veteran? ▼



### 3. The majority of participants understood the various roles within their application flow

- 8/10 participants clearly understood whose details they'd need to provide for the various sections in their specific application flow
- 1/3 participants applying for someone else expressed confusion with the roles once they reached the Contact Information section of the form where they are required to switch to providing applicant, then sponsor details again
- Participants who needed to provide sponsor details generally understood the role of a sponsor as it applies to military families
- One participant expressed confusion regarding language for who they'd be able to sign for as a preparer
- One participant expressed confusion between previously deceased and sponsor terminology

**“Who’s the applicant, sponsor, preparer? [...] Kid's the applicant. I'm the preparer, and I'm also the sponsor.” -P5**

**“I assume it is the sponsor because it is under my military service, so I am sponsoring the disabled child.” -P8**

**“It’s good you have an explanation [for sponsor]”. -P11**

### 3. The majority of participants understood the various roles within their application flow

#### Step 6 of 7: Contact information

Your application will be saved on every change. Your application ID number is 18490.

##### Applicant's mailing address

Country (\*Required)

United States



#### Step 6 of 7: Contact information

Your application will be saved on every change. Your application ID number is 18490.

##### Sponsor's mailing address

Country

United States



Because you indicated you're the sponsor, we've prefilled some of the fields from the sponsor details you provided. If you need to correct anything, you can edit the fields below.

##### Preparer information

Since you indicated you're preparing the application, you'll need to provide your

## 4. While most participants could upload supporting documents in PDF format through mobile, some recommended additional file formats be accepted

- 7/10 participants stated they'd be able to upload supporting documents in the accepted PDF format
- 4/10 participants rated mobile-friendliness lower due to the inability to upload other file formats besides PDFs
- 2/10 participants would have trouble uploading through mobile, while 1 opted not to upload anything
- Several participants were concerned that most users may not be able to upload in PDF format, resulting in longer processing times
- Participants understood that they could provide a DD214, but one considered spouses may not know what a DD214 is, and one wondered about documents for service members

**“I think everyone knows how to save a mobile picture [...] That might make a little bit more sense for an older generation.” -P3**

**“If I was more cellphone savvy, I'd have the documents on my phone or drive or Google to put those documents in there, so I'd feel the need to only fill it out [application] on the computer.” - P7**

**“I feel it's mobile friendly, but there should be an option for the camera to upload that document if you were strictly doing it by mobile [due to PDF limitation].” - P7**

## 4. While most participants could upload supporting documents in PDF format through mobile, some recommended additional file formats be accepted

What kinds of documents can I upload? ▾

Can I mail or fax documents? ▾

Guidelines for uploading a file:

- You can only upload .pdf files.
- Your file should be no larger than 15MB.

**Upload file**

What kind of document is this?

(\*Required)

✓

Discharge

Marriage-related

Dependent-related

Letter

Other

**Delete file**

## 5. Overall, most participants didn't express concerns with potentially sensitive questions, but some felt strongly about providing those details

- 7/10 participants expressed no concerns with having to provide demographics details in the application
- 3/10 participants felt that they shouldn't need to answer demographics questions for their application process
- One participant suggested adding additional options for birth sex
- No participants expressed concerns about sponsor passing question.

**“You see that in just about every form you fill out or something similar.” -P11**

**“Why do you need the statistics on who’s using this and why so in-depth?” -P6**

**“I do see death on a daily basis, so it doesn’t really bother me, but maybe someone who has just experienced death, it may upset them a little bit [...] -P7**

**“My only thing would be that, because it is sensitive to some people, probably put another feature here where some folks could be classified as they, or folks who are trans or non-binary would feel comfortable answering these questions, as well.” -P0**

## 5. Overall, most participants didn't express concerns with potentially sensitive questions, but some felt strongly about providing those details

### Applicant demographics

We require some basic details as part of your application. We understand some of the questions may be personal and sensitive, and apologize for any discomfort this may cause. Please know we need to gather the data for statistical purposes.

What's your birth sex? (\*Required)

☐ Female

☐ Male

Which categories best describe you? (You may check more than one) (\*Required)

☐ American Indian or Alaskan Native

☐ Asian

☐ Black or African American

## 6. When having to select a desired cemetery for burial, several participants expressed not knowing which to pick

- 6/10 participants didn't state a specific desired cemetery for burial or their preference is unknown
- 2/10 participants expressed they were unsure which desired cemetery to pick
- 2/10 participants knew at which national cemetery they would want to be buried
- Some participants wanted to be buried in a national cemetery, but others were undecided on their method of burial
- One participant was concerned they would be reassigned to another cemetery if their desired cemetery wasn't available

**“I don’t know if everyone feels ready [to pick] when they’re doing the application [...] That feels like the biggest commitment [...]” -P3**

**Regarding picking a desired cemetery: “That is information I wouldn’t know off the top of my head.” -P6**

**“The way it looks right now, they may try to assign you to a place that may not be suitable to your family.” -P6**

## 6. When having to select a desired cemetery for burial, several participants expressed not knowing which to pick

Your application will be saved on every change. Your application ID number 8239434.

Which VA national cemetery would you prefer to be buried in?

**Please note:** This doesn't guarantee you'll be buried in your preferred cemetery. We'll try to fulfill your wishes, but will assign a gravesite in a cemetery with available space at the time of need.



## 7. Participants were able to provide applicant or sponsor military details

- 10/10 participants expressed they would have no issues providing military or service period details or would know where to find that information
- 3/10 participants didn't know what to provide for VA claim number field, with one thinking it might apply to Vietnam War Veterans
- 2/10 participants suggested VA should prefill military details from their DD214
- One participant mentioned a spouse might not know the sponsor's character of service
- One participant suggested the character of service field label could be improved as it was confusing to them

**“I don’t know what that means as it relates to burial. I would know a claim number if I’m putting in a benefits claim to the VA for compensation or something else... They assign a claim number, but I don’t know how it applies to this.” -P11**

**“I don’t think anyone knows their claim numbers.” -P3**

**“Character of discharge, type of discharge might be better.” -P6**

## 7. Participants were able to provide applicant or sponsor military details

**Military details**

Military Service number (if it's different than your Social Security number)

VA claim number (if known)

Current military status (You can add more service history information later in this application.) (\*Required)

# Secondary Findings

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1. Participants generally **ranged in expectations for VA responsiveness** on their decision for eligibility, with estimates ranging from weeks/one month to over a year
2. Participant's **prior knowledge of Pre-Need was evenly split**, with half knowing about it and half not being aware they could apply for burial at a VA national cemetery
3. Participant **estimates for eligibility requirements varied greatly**, with some guessing a service-connected disability would render them eligible while others thought honorable service would
4. The majority of participants **expressed interest in applying** for Pre-Need
5. Participants mostly **took the time to read the Pre-Need Information (static) page**, with several wondering about requirements for Arlington National Cemetery, and one noting there was a lot to read on this page, while a few had trouble locating “Apply” button
6. Overall, content in the form, such as for documents needed, is **targeted to Veterans**, not as much to service members even though they are mentioned throughout



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# Recommendations

Pre-Need Pre-Integration Usability Study | June 2023

1. Continue to assess the Pre-Need user flows for improvements and potentially explore grouping all content from related sections together (Applicant, Sponsor, Preparer) in consecutive order
2. Determine if any optional questions can be eliminated from the application, especially since additional questions will likely be added for Integration
3. Assess field label possibilities for "Relationship to Service Member or Veteran" question when applying for self vs. applying for someone else
4. Assess language for preparers to clearly communicate who they can sign for when completing an application on behalf of someone else
5. Provide a link to national cemeteries near the desired cemetery field to aid participants in finding a cemetery
6. Clarify note regarding assignments to other national cemeteries if space is unavailable at the applicant's desired cemetery for burial
7. Clarify "VA claim number" field so users understand what to provide



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# Future Enhancements

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1. Explore feasibility of adding a checkbox to Sponsor Contact Details for users to indicate if address is the same as Applicant's for Integration MVP
2. Improve clarity for preparer question to ensure applicants have no difficulty determining correct choices when applying for themselves or on behalf of someone else
3. Assess if guidance is needed on Review Application page, particularly for applicants in the upper age brackets as this would require modifying the VA.gov standard pattern
4. Assess possibilities for capturing additional, more diverse options for demographics questions for Integration form
5. While we can currently only accept the upload of PDF documents due to EAOS legacy system limitations, explore incorporating additional file formats such as image files, for Integration, along with possibilities for using phone camera for image captures when uploading with VA.gov Platform Team
6. Discuss the feasibility of prefilling service data from DD214 with VA.gov Platform Team

# Additional Pattern Insights

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1. One participant noted that the progress bar doesn't seem to move as they're making their way through the form



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# Next Steps

Pre-Need Pre-Integration Usability Study | June 2023

- Update the Pre-Need Pre-Integration prototype to incorporate agreed-upon recommendations
- Share findings with stakeholders and other teams working on VA.gov
- Incorporate learnings into Integration MVP prototype
- Conduct usability study for Integration MVP solution

# Appendiz

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# Research Documents

Pre-Need Pre-Integration Usability Study | June 2023

1. [Research Plan](#)
2. [Conversation guide](#)
3. [Transcripts](#)
4. [Prototype](#)
5. [Synthesis Mural Board](#)
6. [Quantitative Results](#)



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