

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

Usability Study Readout - MBS Self Service Team

*August 2023*



U.S. Department  
of Veterans Affairs

# Research Goals

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# Research Goals

Pre-Need Integration Usability Study | August 2023

The goals of this usability study were to assess user reactions to enhancements necessary for Pre-Need integration with MBMS specifically to:

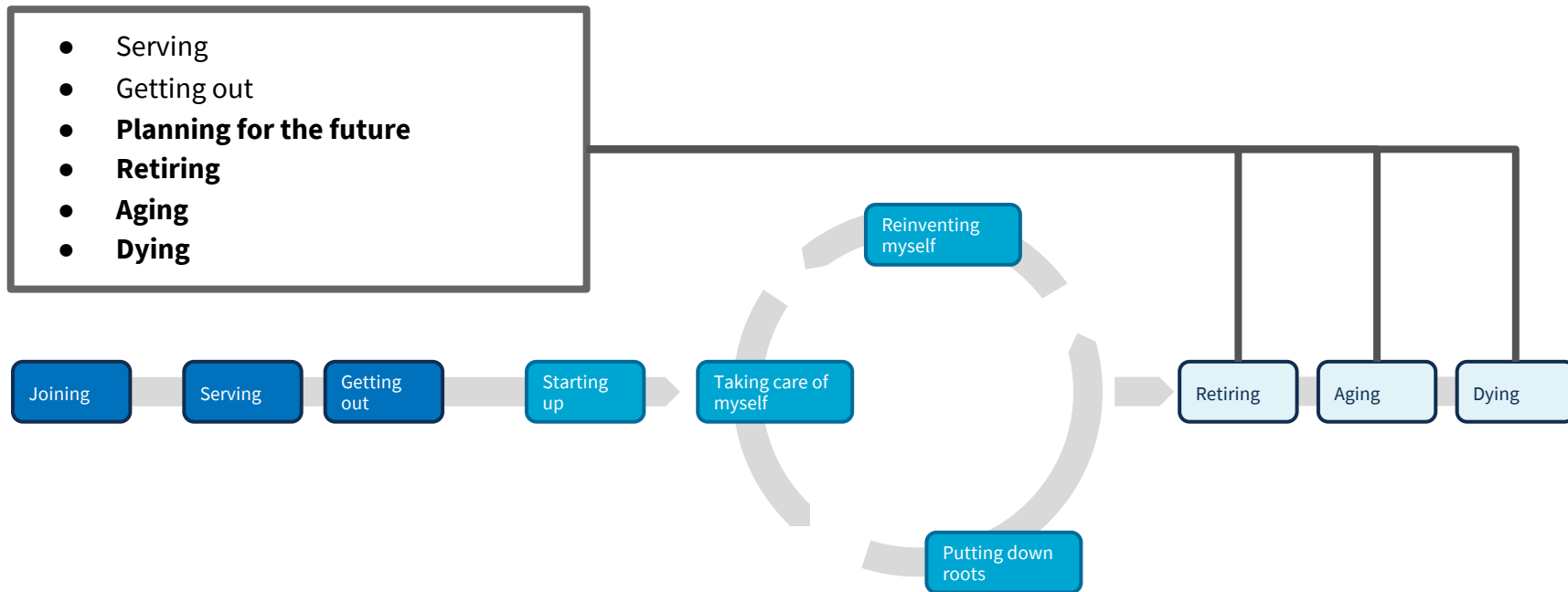
- **Learn how users experience applying for pre-need** as it relates to the addition of new fields for Integration and determine what's working well and if pain points exist.
- **Determine if flow enhancements** to the grouping of pages mitigate user confusion with the entering of their details.
- **Assess additional integration enhancements** for content, IA, accessibility, and design to determine what's working well and what isn't.



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# How this research maps to the Veteran journey

Pre-Need Integration Usability Study | August 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 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

VA



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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 Integration designs.

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

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.



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# Methodology

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Participants completed scenarios for the following use cases:

- Applying for self as a Veteran applicant
- Applying for self as a non-Veteran applicant
- Applying on behalf of a Veteran applicant
- Applying on behalf of a non-Veteran applicant
  - As a preparer who is not the applicant's sponsor
  - As a preparer who is the applicant's sponsor



# Participant Demographics

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10 participants recruited, all 10 completed sessions:

- 4 males, 6 females
- 4 mobile, 6 desktop
- Ages 32-73 (5 aged 55+)
- 3 Black or African American, 2 White or Caucasian, 2 Hispanic or Latino, 1 American Indian or Alaskan Native, 1 Asian, 1 prefer not to answer
- 1 high school graduate, 5 bachelor's degree, 4 master's degree
- 8 with cognitive disabilities

# Participant Demographics

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

- Other than honorable
- Immigrant origin
- Expat (living abroad)
- LGBTQ+
- Assistive tech (due to prototype limitations)

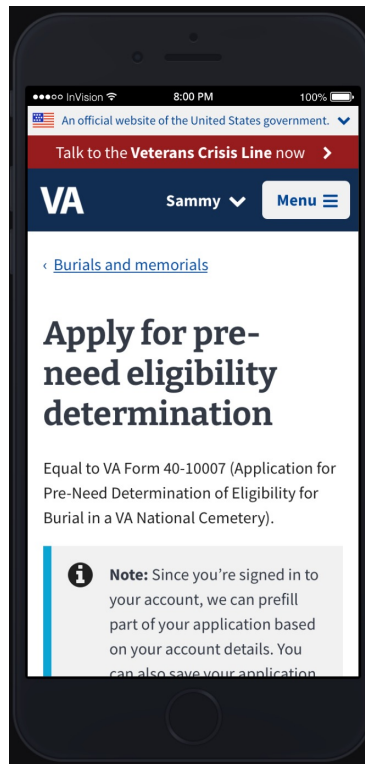
We recommend studies with these underserved groups in the future.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	<b>Pre-Need Integration Usability Study - August 2023</b>																
2	final # of participants	10			# of AT users				0		# of no shows				0		
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%	5	5	1	1	0	1	0	0	0	0	1	1	0	0	0
6	<a href="#">Cognitive Disability</a>	50.00%	5	8	0	1	1	1	1	0	1	1	1	1	0	0	0
7	<a href="#">Mobile user</a>	50.00%	5	4	1	0	0	1	0	1	0	0	1	0	0	0	0
8	<a href="#">Rural</a>	25.00%	3	4	1	0	1	0	0	0	0	0	1	1	0	0	0
9	<a href="#">No degree</a>	25.00%	3	1	0	0	0	0	0	0	0	0	0	1	0	0	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%	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0
12	<a href="#">Women</a>	10.00%	1	6	1	1	0	0	1	0	1	1	0	1	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	3	0	0	0	1	1	0	1	0	0	0	0	0	0
17	Hispanic	12.00%	2	2	0	0	0	0	0	0	0	1	1	0	0	0	0
18	Biracial	3.90%	1	4	0	0	0	0	0	1	0	1	1	1	0	0	0
19	Asian	3.00%	1	1	0	0	0	0	0	1	0	0	0	0	0	0	0
20	Native	0.30%	1	1	0	0	0	0	0	0	0	0	0	1	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 ally specialist to help you complete this. Targets are for a gener														
28	Beginner AT User	50.00%	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

[Participant Tracker on Google Sheets](#)

# Pre-Need Integration Prototype

Pre-Need Integration Usability Study | August 2023



# Key Findings

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# Key Findings

Pre-Need Integration Usability Study | August 2023

1. All participants **understood the new fields and options** required for integration.
2. All participants **easily navigated adjustments to the flow of pages**.
3. Most participants found the Pre-Need Integration **application process to be self-explanatory and straightforward**.
4. All participants **quickly determined who they were applying for** when going through their specific scenarios.
5. Most participants **understood the various roles in the application**, although a few had challenges with the terminology.
6. While many participants **would be able to upload supporting files** through mobile, others would have challenges.
7. All participants **expressed confidence in picking a desired VA national cemetery** for burial or in knowing where to look for one.



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# 1. All participants understood the new fields and options required for integration

- 10/10 participants smoothly navigated interactions with the new fields and options or with inputting data into them.
- Participants generally appreciated having a "Prefer not to answer" option for the demographics fields.
- One participant wondered why they had to answer demographics questions for their pre-need application.
- One participant questioned what statistical purposes there could be for collecting demographics.
- One participant of Hispanic origin expressed being unsure what to select for race categories field after selecting ethnicity options (which list Hispanic).
- One participant suggested more context to be provided for "Other comment" text area for race categories field.

**“You’re giving them the prefer not to answer options. So, I think that’s a good way to do it.” P9**

**“I prefer not to answer. What difference does it make for the ethnicity for the person being buried or the sponsor?” P7**

**"The 'Other' [text area] box would be for something that is not on the list [race categories field]. When I fill out these forms this is tricky because I identify as Hispanic, Latino. So, am I White or other?" P8**

**"No, I don't think it's anything that's not understandable. If you're bi-racial, and the list doesn't let you select more than one ... or if the list doesn't have what I'm looking for [they'd use other comment text area]." P6**

## 2. All participants easily navigated adjustments to the flow of pages

- 10/10 participants seamlessly navigated newly-grouped pages based on role (e.g. applicant/sponsor/preparer).
- A few participants suggested having a checkbox for applicant or sponsor address pages to prefill data if the preparer, applicant, or sponsor lived in the same home.
- One participant wondered how a homeless Veteran would enter their address details if applying.
- One participant suggested having the sponsor death question located before sponsor address fields.
- No participants expressed concerns over the length of the application process.

**“I think the more appropriate way is if the sponsor is deceased. If you’re going to ask this question, it needs to be before what is the status of the person filling it out, the sponsor. If the person is deceased, it would make sense then.” P7**

**“Suppose someone was doing outreach, community outreach, and was a homeless Veteran and you were filling out this information for them and they were down in the south, how would this be handled?” P4**



## 2. All participants easily navigated adjustments to the flow of pages

**Step 2 of 7: Applicant information**  
We'll save your application on every change.

**Applicant's mailing address**

Country (\*Required)

United States

◆

Street address (\*Required)

123 Main St

**Step 3 of 7: Sponsor information**  
We'll save your application on every change.

**Sponsor's mailing address**

Country

United States

◆

Street address

### 3. Most participants found the Pre-Need Integration application process to be self-explanatory and straightforward

- 8/10 participants were able to easily complete tasks for their specific flow, while 2 participants had some difficulty completing the most challenging flows as a preparer.
- Participants would be able to get additional help using the resources noted throughout the application if they had some difficulty or had questions.
- Participants appreciated having their information prefill in certain areas and being able to review their data before submitting.
- Next steps were easily located by participants after submitting the application, and they found enhancements to the Confirmation page to be helpful.
- 93% (4.65/5) overall application process rating from participants, 84% overall participant mobile friendliness rating.

**"I know the mindset of people in the state of grief [...] keep in mind that when people start the application, you're pulling their brain from many areas and trying to ease them into it and focus on one task at that particular moment. In that scenario, this would've been easy to go through and relieved that it was easier to accomplish than I anticipated it would be." P3**

**"So far, it's pretty self-explanatory. I think I could do this [apply] pretty much on my own." P10**

**"It wasn't bad. It was easy to follow through. The only thing was that first page [pre-need information page] was very very wordy, but once you got into the application, everything was self-explanatory." P5**

**"I like how it was pre-filled and knowing that someone has an account, their information is already pulled over." P5**

### 3. Most participants found the Pre-Need Integration application process to be self-explanatory and straightforward

What worked well when applying:

- Self-explanatory
- Could do it on their own
- Easy to accomplish despite potentially being in a state of grief
- Easier than anticipated
- Went pretty fast, went quickly
- Smooth
- Pretty user-friendly
- Prefilling was helpful for those with an account
- Reviewing before submitting was a plus
- Being able to save your progress
- Straightforward
- Wouldn't make any changes to process

## 4. All participants quickly determined who they were applying for when going through their specific scenarios

- 10/10 participants correctly determined whether they were applying for themselves or on behalf of someone else as a preparer.
- 7/10 participants understood the "Relationship to service member or Veteran" question, but a few had confusion with the copy for the label.
- One participant questioned what someone who had a domestic partner would select for relationship options.
- One participant suggested having more specificity around "Other" option for Relationship to service member or Veteran field.
- One participant (Pilot) wondered what the Corey Shea Act is.

**"What if I'm a domestic partner for the member who is passing away? It should be open to all types of people." P4**

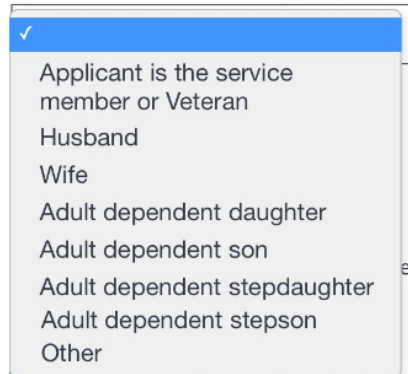
**"Now those are pretty self-explanatory" [relationship field help text]. P7**

## 4. All participants quickly determined who they were applying for when going through their specific scenarios

### Step 2 of 7: Applicant information

We'll save your application on every change.

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



A screenshot of a web form showing a dropdown menu. The dropdown is open, displaying a list of relationship options. The first option, 'Applicant is the service member or Veteran', is highlighted with a blue background and a checkmark icon. The other options are listed below it in a standard font.

- ✓ Applicant is the service member or Veteran
- Husband
- Wife
- Adult dependent daughter
- Adult dependent son
- Adult dependent stepdaughter
- Adult dependent stepson
- Other

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

To help us determine the applicant's eligibility for burial in a VA national cemetery, we'll ask questions about the service member or Veteran who's sponsoring their benefits.

- A **husband** or **wife** is considered the legally married spouse or surviving spouse of a service member or Veteran (the sponsor).
- An unmarried **adult dependent** child is an individual who became permanently physically or mentally disabled and incapable of self-support (before the age of 21, or before 23 years of age if pursuing a full-time course of instruction at an approved educational institution).
- **Other** applicants can include the parent of a service member who passed away and is applying under the Corey Shea Act.

## 5. Most participants understood the roles in the application, but a few had challenges with the terminology

- 8/10 participants overall understood the terminology for their specific application flow.
- 8/10 participants determined whose details they'd need to provide for applicant information.
- 4/4 participants who experienced applying for self process, either as a Veteran or as a non-Veteran, clearly understood whose details they'd need to provide for their specific scenario.
- For preparers going through the lengthiest application process, 2/6 participants had some challenges in differentiating whose details would need to be entered in the various sections.
- 5/6 participants filling out form as preparers understood where they'd need to provide their own details.
- 4/5 participants having to enter sponsor details understood whose details they'd need to provide for those pages.

**"I would know that. I am very familiar with the term sponsor." P1**

**"It is clear now that this [sponsor details] would be the Veteran, my wife." P3**

**"I understand the need because if the sponsor is deceased and the wife is wanting to bury the sponsor at a cemetery, maybe 'guardian'? The words sponsor is confusing." P7**

**"I am getting the names confused." P10**

## 5. Most participants understood the roles in the application, but a few had challenges with the terminology

### Step 1 of 7: Preparer information

We'll save your application on every change.

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

☐ I'm applying for myself

☐ I'm applying for someone else

What to know if you're applying for someone else ▼

### Step 1 of 7: Preparer information

We'll save your application on every change.

#### Your details

You told us that you're applying for someone else. First, we'll ask for your details. Then we'll ask about the person you're applying for (called the applicant).

Your first name (\*Required)

Sammy

Your last name (\*Required)

Smith

## 6. While many participants would be able to upload supporting files through mobile, others would have challenges

- 4/10 participants were unsure how to upload files through mobile.
- Several participants hoped they'd be able to take a picture of their documents to upload.
- A few mentioned having unfamiliarity with converting images to PDFs.
- Information they saw earlier in the process affected what they thought they should upload to help their application.
- 84% overall participant mobile friendliness rating from participants was partially affected by format limits for uploads.

**"Good to know uploading DD214 makes it go faster. Good to know having help filling the form is there as well as the Apply details." P8**

**"I could take a picture and put it in. I could go in my OneDrive and attach a scanned document." P2**

**"You tell them before you start the official [application] process, you tell them to have these [upload files] available." P7**

**"I don't have apps on my phone and I need to update [...] my DD214 on to it, and it's just not friendly." P7**

**"That I don't know. Maybe from my Google Drive or Google Docs." P1**



## 6. While many participants would be able to upload supporting files through mobile, others would have challenges

What participants surmised they should upload:

- DD214 (theirs or the sponsor's)
- Marriage/death certificates
- Medical documentation for disabled child
- Power of Attorney (if applying for someone else)

Reasons why participants would have trouble uploading on mobile:

- Don't know how to use their phone to upload
- Would need to get another person to help them
- Unsure how to save a file for uploading on the phone
- Wouldn't know how to turn a photo they took of the file to PDF
- Feel more comfortable mailing/faxing supporting files to VA

What kinds of files can I upload?

If you're applying for yourself +

If you're applying on behalf of someone else +

Can I mail or fax files? +

Guidelines for uploading a file:

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

[Upload file](#)

## 7. All participants expressed confidence in picking a desired VA national cemetery for burial or in knowing where to look for one

- 10/10 participants had a VA national cemetery in mind for where they wanted to be buried or would know where to look to find one.
- All participants who didn't know where to be buried would use the new external link to "Find a VA national cemetery".
- Nearly all participants understood question regarding previous decedents.
- Some participants felt reassured when they learned that they wouldn't be reassigned without consulting their families if space is unavailable at their desired cemetery.
- No participants had difficulty in entering previous decedent details.

**"I'd have a cemetery close to my house in mind." P3**

**"I would click on that highlighted area [cemetery link] and see if there was another one, and if there wasn't, then I would just continue." P7**

**"I like how you're telling us up front that there's no guarantee here, and I like how you tell us that you'll work with our family if there's no space available. So, I do like that. That's a great placement." P5**

**"Yes, if there is anyone buried with me or claimed it under my name or something like that." P6**

## 7. All participants expressed confidence in picking a desired VA national cemetery for burial or in knowing where to look for one

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

[Find a VA national cemetery \(opens in a new tab\)](#)

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

### Name of deceased person(s)

Please provide the details of the person(s) currently buried in a VA national cemetery under your eligibility.

Deceased's first name (\*Required)

Deceased's last name (\*Required)

[Add another name of deceased](#)

# Secondary Findings

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1. Most participants **found the eligibility and application process guidance** on the Pre-Need Information and Form Introduction pages to be **valuable** as they prepared to start applying.
2. While nearly all applicants would be able to provide military history details for themselves or for a sponsor, some participants suggested **providing additional guidance for where to find service period details** (e.g. the DD214).
3. The **VA Claim Number field still poses challenges** to participants due to the lack of context.
4. Users have **varying expectations for VA decision times** on their claim (one week to several months).
5. A few participants recommended **having more concrete VA decision timelines listed** as they found guidance on the After You Apply page to be insufficient.



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# Recommendations

Pre-Need Integration Usability Study | August 2023

1. Continue to assess the pre-need application process for improvements.
2. Consider if more context is needed for "Other comment" text area for race categories field when selecting "Other".
3. Optimize the sponsor flow to ensure users aren't seeing pages they don't need to if they indicate the sponsor passed away.
4. Assess sponsor pages to see if there are additional opportunities for improving user understanding for lengthier application flows.
5. Explore copy improvements for the "Relationship to service member or Veteran" field to ensure user understanding regardless of if applying for self or someone else.
6. Include additional context for whose details are needed for applicant details.
7. Allow users to upload additional file formats such as PNG and JPEG.
8. Include the ability to upload directly by taking a photo with your camera on the spot.
9. Provide guidance for VA Claim Number field.
10. Explore including guidance on decision times on Confirmation page as well as refining guidance on form Introduction page and After You Apply page.



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# Future Enhancements

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1. Determine possibilities for providing additional information regarding Corey Shea Act on VA.gov
2. Research possibilities for adding a checkbox to certain address pages to easily fill in with previously provided details for users living in the same household.

# Additional Pattern Insights

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1. Create a feature request for VA.gov to ensure there is a way to capture situations in a Veteran's VA.gov profile and in application in which they may have no home address, as there currently isn't a way to do so.

# Next Steps

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- Share findings with stakeholders and other teams working on VA.gov
- Review recommendations
- Update the Pre-Need Integration prototype to incorporate agreed-upon recommendations
- Begin epic creation



# Appendix

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# Research Documents

Pre-Need Integration Usability Study | August 2023

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



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