# **Conversation Guide for a Board Appeal (NOD) Usability Study, March 2021**

## **Moderator logistics & setup**

*Use* [*#feedback-backchannel*](https://dsva.slack.com/messages/C40B45NJK/details/) *in Slack for real-time feedback from observers.*

*Before the session, send out the* [*observer instructions*](https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/platform/research/during-research/howto-observer-instructions.md) *to your observers (Slackbot will do this for you if you type "observer instructions" into* [*#feedback-backchannel*](https://dsva.slack.com/channels/feedback-backchannel)*).*

*In the Attendees section, make sure everyone except the participant is on mute*

*In the Audio section, click the drop-down arrow and make sure "Play Entry/Exit Chimes" is unchecked*

*Check your screen sharing setup*

*Send a link to the invision prototype*

[*https://vsateams.invisionapp.com/share/8Y10I6K7DU9R#/screens/447558866*](https://vsateams.invisionapp.com/share/8Y10I6K7DU9R#/screens/447558866)

*When the participant is ready, begin the session with the following intro:*

## **Intro - 5 minutes**

Thanks for joining us today! My name is Christian and I also have some colleagues on the line observing and taking notes.

Today we're going to talk about Board Appeals (also called Notice of Disagreement). When a veteran chooses this option, they are appealing to a Veterans Law Judge at the Board of Veterans' Appeals in Washington, D.C. A judge who’s an expert in Veterans law will review their case.

Before we start, a few things I want to mention:

* This entire session should take up to 60 minutes. I want to be sure not to keep you much longer, so I may occasionally prompt you with the next question or topic.
* In this session, we want to hear your honest opinions. We are not testing your ability. We just want to improve these tools to better meet veterans’ needs. I will not be offended by any opinions you express, and I welcome your feedback.
* Looking at these websites, none of your actions will affect your actual VA information or benefits.
* If for any reason and at any time you want to stop the session, please let me know.
* Are you comfortable if I record my screen and audio as we talk today? We use the recordings to confirm that we have captured your opinions accurately. The recordings are destroyed after we complete the analysis, and none of your comments will be attributed to you directly.
  + If yes: Once I start recording, I am going to confirm that you are ok with me recording this session once more.

*Start recording.*

* I have started recording. I'd like to confirm: Are you comfortable if I record my screen and the audio as we talk today?

## **Warm-up Questions - 5 minutes**

Before we look at the website, let’s start with a few warm-up questions.

* Can you tell me a little about yourself or your service history?
* Have you used the VA.gov website before?
  + If yes, what was the last thing you were doing or looking for on the site?
  + How was that experience?
* Have you ever tried to file a claim for a disability with the VA?
  + If yes, how was that experience?
* Have you ever filed an appeal on a decision you received from the VA?
  + If yes, how was that experience?
* Lets take a look at the prototype now. Since this is a prototype, some buttons and features will work, some will not.

## **Task 1: [Request a Board appeal]:**

Imagine that you have logged in to VA.gov and you have navigated to this page (*Board Appeals Info* page) because you disagree with a decision VA has made about one or more issues you have submitted a claim for.

Starting on this page, please walk me through how you would request a Board Appeal (also called *Notice of disagreement*). Please tell me what you see on each page, what you think the purpose of it is and what you would do on the page. (It is helpful if you think out loud, so I can follow what you are thinking, trying to do, and experiencing).

## Board Appeals info page

* Take a look at this page and tell me what you see here, and what you would do on this page.
* What are your first impressions of this page?
* Is anything on this page unclear or confusing?
* Do you think any information is missing on this page?

**Things to watch for:**

* Does the participant understand the meaning of the 3 different Board Appeal Options?
* Does the participant notice by themselves the *Request a board appeal* button?
* Does the participant notice the *Track the status of your claim* button?
* Does the participant scroll down enough to notice the helpful info section?

## Veteran detail pages

* Is anything unclear or confusing on these pages?
* Do you think any information is missing on this page?
* Any other comments?

**Things to watch for:**

* How do participants react to the scenario in which they work with a VSO or attorney to solve this?

## Issues eligible for review page

* Tell me what you think the purpose of this page is and what you would do on this page.
* Is anything on this page unclear or confusing?
* Do you understand what opting into the new appeals process means?
  + Do you understand the consequences of this choice?
* Is there any information missing on this page?
* Any other comments?

Imagine that you see only half of the issues you have previously registered, on this page. What would you think and do?

Imagine now that you want to make a Board Appeal for 2 issues: let’s say for *Tinnitus* and *Arthritis* (in your left ankle). Let's assume you have all the info and documents at hand to make a Board Appeal.

### Things to watch for:

* Do they understand how to add one or more issues to appeal?
* Do they by themselves, notice and click on the ‘*Why can’t I see my issue’* link?
  + Do they believe this information is valuable? Why or why not?
* Do they understand why only some of their issues might be listed here?
  + What do they think about that?
* Does the participant notice the *Opt-in to the new appeals process* checkmark?
  + Do they understand this option and its consequences?
* Does the participant notice that a new issue has been listed after adding an issue?

## Board review option page

* What do you see on this page and what would you do here?
* Is anything on this page unclear or confusing?
* Is there any information missing on this page?

Imagine that you have learned from your VSO (Veterans Service Organization) or attorney, that you need to submit new evidence, but that a hearing is not necessary. What would you do on this page?

### Things to watch for:

* Does the participant understand the 3 *Board Review options*?
  + Do they understand the consequence for each of these options?
* How do participants react to the scenario in wich they work with a VSO or attorney to solve this?
* Do they wonder how long each option might actually take?

## Additional evidence page

* What do you see on this page and what would you do here?
* Is anything on this page unclear or confusing?
* Is there any information missing on this page?

Imagine you have one piece of evidence you want to submit. What would you do on this page?

### Things to watch for:

* Does the participant understand how to add new documents?
* Is the participant confused about what formats can be uploaded?
* Does the participant understand how to send in additional evidence later?
* Do the participants notice the 25MB limit? How does the participant react to this?

## Review application page

* Tell me what you think the purpose of this page is and what you would do here.
* Is anything on this page unclear or confusing?
* Are all the information you need on this page?
* Any other comments?

Imagine that you come to the page called Review Application. You review all the info on this page and notice that your old phone number is listed here. What would you do?

### Things to watch for:

* Does it seem self evident that they need to click the +- icon to expand and collaps info cards?
* Do they find easily the checkmark for Privacy Policy acceptance?
* Do they find anything confusing or unclear on the Submitted page? (Do they ask about when the claim would show in the claim status tool?)

## **Post-Task Interview - 5-10 minutes**

* Having gone through the form, how was that experience?
* What was most unclear or confusing in the form?
* Was there any information that were missing?
* What was most helpful in the form?
* What is one thing that could be improved in the form?
* Any other comments?

## **Thank-You and Closing - 2 minutes**

We really appreciate you taking the time to share your thoughts with us today. Your feedback is so helpful to us as we continue to work on the site and make sure it really works for Veterans.

Thanks! Lastly, do you know any other Veterans, caregivers, or service members who might be willing to participate in a future user research session? If Yes: Thank you! I'll have our team send you an email with a little blurb that you can pass along.

Great, well thank you so much again, and enjoy the rest of your day!