# Conversation Guide

Prototype Desktop Link (to be linked)

Prototype Mobile Link

[Mobile testing guidance](https://depo-platform-documentation.scrollhelp.site/research-design/research-mobile-sessions)

Mural board for notes (to be linked)

## Moderator logistics

### 2-3 days before the session

* Review VA Platform's [Research Checklist](https://depo-platform-documentation.scrollhelp.site/research-design/Research-Checklist.1958773011.html#ResearchChecklist-5.Conductsessions).
* Complete any project-specific setup tasks for this study (List them below)
* Step 1
* Step 2
* Step 3

### Day of the session

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

Mute your Slack notifications.

Send out the [*observer instructions*](https://depo-platform-documentation.scrollhelp.site/research-design/Observer-guidelines.1622311177.html) to your observers (Slackbot will do this for you if you type "observer instructions" into [*#feedback-backchannel*](https://dsva.slack.com/channels/feedback-backchannel)).

### Starting the session

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

In the Participant "more" menu, make sure "Play Join and Leave Sound" is unchecked

Check your Zoom screen, providing remote control to participants.

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

## Intro - 5 minutes

Thanks for joining us today! My name is [NAME] and [NOTETAKER NAME] is taking notes. I also have some colleagues on the line observing and taking notes. Today we're going to show you some ideas related to viewing and sending messages.

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

* **This entire session should take about 1 hour.** 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.
* **You'll be interacting with a Demo.** This is a demo and not a live website, parts may not function exactly the way you expect. Some areas of the prototype will be clickable, and some will not. Just let me know what you'd expect to happen in that case. Since it's a demo, 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 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 (Optional) - 5-10 minutes

* What device are you using to talk to us today?
* Have you used My HealtheVet? If Yes, how often do you use it? What do you use it for? How do you access it (phone, tablet, laptop, etc)?
* Do you ever send messages in My HealtheVet? What kind of messages do you send? Do you feel comfortable sending that information? Is there anything that you aren't comfortable sending in messages? What makes you comfortable/uncomfortable?

**First Task: Message threads – 5 minutes**

Since we are trying to make this experience as realistic as possible, you will notice on the top right the name Jesse. If this were the live website it would be your name, but for today you will see Jesse at the top of your screen and the name Jesse Roberts on messages.

I’m going to have you start by taking a look at some of the messages in the inbox.

Let’s focus on the first message from Ann Dunwoody.

* What do you think the “7 messages” in parentheses means? What makes you say that?
* If you were to click on this message, what would you expect to see? What makes you say that?

Go ahead and click on it.

*After participant clicks on it ask:*

* What do you think we are looking at here?
* Is this what you expected to see?
* How many messages do you think are unread in this conversation? What makes you say that?

Please open the message from September 1st.

* Is this what you expected to see? *If participant says “no” ask:* What would you have expected?
* Please close the message. (*Assist participant if needed.)*
* Do you notice anything different about that message? *If no,* How many messages in this conversation are unread? What makes you say that?

*When ready for Task 2:*

Let’s pause right here for a moment.

Using the scale we showed earlier of 1 being very difficult to 5 being very easy, please rate this first task.

**Things to watch for:**

* Does the participant understand which messages are read vs. unread?
* Does the participant understand that some messages are threads and have multiple messages?

**Second Task: Replying to a message - 10 minutes**

*Help participant navigate back to Dunwoody message from September 15th if necessary.*

Let's say you wanted to respond to this message from Ann Dunwoody. How would you do that?

*(mobile: there is a button in the toolbar and below the message)*

*After participant clicks "Reply":*

* If you needed to send her a document, how would you do that?

*Tell participant they can choose any document. It will show up as an attachment called laptop.pdf*

* If you changed your mind about attaching the document and wanted to get rid of it, how would you do that?

*After the participant clicks “Remove”:*

* If you decided that you didn't want to respond at that moment and needed to get rid of the message, how would you do that? *(the Discard Draft button is disabled)*
* What would you expect to happen when you click that button? What makes you say that?
* What if you had typed up a whole message and then realized you didn’t have all the information you need to respond now and wanted to come back and finish later? What would you do?
  + Would you have expected your message to be saved?
* How do you know your draft will be there when you return?

*When ready for Task 3:*

Using the scale we showed earlier of 1 being very difficult to 5 being very easy,

* Please rate the difficulty of replying to a message.
* Please rate the difficulty of adding and removing documents.

*After participant answers:*

Please click Send and we will move on to the next task.

**Things to watch for:**

* Which "Reply" option does the participant use - the toolbar or the button?
* Does the participant understand how to use the Attach and Remove buttons?
* Does the participant notice the “auto saved” message?
* Does the participant make the assumption that it saves automatically?

**Third Task: Finding a Message – 10 minutes**

Now I would like you to find a message.

The message is one you received from Dr. Beth Smith the last week of August with your test results. How would you find that message?

*If participant starts scrolling: (pagination is disabled)*

* Can you tell me why you chose to start scrolling?
* What if there were hundreds of messages and you were in a hurry. What might you do instead of scrolling?

*(Guide participant to Search box/Advanced search if necessary – links on top and bottom of screen)*

*If participant clicks “Search the Inbox” and it’s populated with “test results”:*

* Because this is a prototype, we filled that search out for you. Is that what you would have typed? *(if no, ask:* What would you have typed?)
* Are these the results you would expect by searching “test results”?

*(Pagination is disabled)*

* I see you used the search function, but you still had to do some scrolling and did not find the message.
* What if there were hundreds of messages with test results and you were in a hurry? Is there a way you might be able to narrow your search?

*(Guide participant to Advanced Search if necessary– links on top and bottom of screen)*

*If participant clicks on “search messages” in nav bar/menu and clicks the Enter keyword field and it’s populated with “test results” then clicks “Search in” which is also populated.*

* Because this is a prototype, we filled that search out for you. Is that what you would have typed? *(if no, ask:* What would you have typed?)
* Are these the results you would expect by searching “test results”?
* I see you used the search function, but you still had to do some scrolling and did not find the message.
* What if there were hundreds of messages with test results and you were in a hurry? Is there a way you might be able to narrow your search?

*(Guide participant to Advanced Search if necessary– links on top and bottom of screen)*

*Clicks “Advanced Search”:*

I would like you to consider each field in this form before clicking the search button.

*If participant goes to Advanced Search without assistance:*

* Why did you decide to go directly to Advanced Search?

*Folder*

* Because this is a prototype, we filled out some of the form for you. Is that what you would have chosen? *(if no, ask:* What would you have chosen?)

*Message ID*

* What would you expect would be in this field? What makes you say that?

*From*

* What would you have typed here? What makes you say that?

*Subject*

* What would you have typed here? What makes you say that?

*Category (the field will populate with “test”)*

* Is that what you would have chosen? *(if no, ask:* What would you have chosen?)

*Date Range*

*If participant chooses Custom (Start date = 8/25, End date = 8/31)*

* Is that what you would have chosen? *(if no, ask:* What would you have chosen?)

*After participant clicks search:*

* Are these the results you would expect with these search terms? What makes you say that?
* What folder was your message found in? How do you know that?

*If the participant doesn’t mention the search was in the inbox, ask:*

* Did you search in all folders or just the inbox? What makes you say that?
* What would you have changed if the message was not in the inbox, but in your Eye doctor folder? What makes you say that?

If you notice the yellow highlighted text, it’s highlighting your search terms in the subject line of the message.

* What does that tell you about where the system searched? What makes you say that?
* Are there other parts of the message that you might want to search? *If participant struggles, ask them to open it to look.*

We’re going to pause here on this screen.

*When ready for Task 4:*

Using the scale we showed earlier of 1 being very difficult to 5 being very easy, please rate the experience of searching for a message.

What parts of the search feature did you find valuable?

**Things to watch for:**

Does the participant notice the “Search Messages” link in the nav bar?

Does the participant notice the “Advanced Search” function?

Does the participant know the value of the “Advanced Search” function?

**Fourth Task: Organizing a message – 10 minutes**

Can you please return to the inbox? *Assist participant if necessary.*

In the last task, I mentioned hundreds of messages. Let’s pretend you want to create a folder for storing messages you soon will be receiving from different providers about your kidney disease. How would you do that?

*Desktop: If participant doesn’t readily notice the Folders link in the nav bar, go ahead and direct them.*

*Mobile: If participant doesn’t readily click the “In the Messages section” hamburger, go ahead and direct them.*

*If they don’t automatically click the “Create Folder” button, ask:*

* What would you do next?

*When the “Create new folder” pop-up appears:*

* Again, because we are using a prototype today, we saved you some time by typing in the name.

*After the participant clicks through and is back on the Folders screen ask:*

* Do you see the new folder?
* What would you do if you wanted to change the name of the Cardiologist folder to the doctor’s name, Dunwoody?

*If the participant struggles to find “Edit folder name” give them a hint.*

*When it says “Folder successfully renamed” ask participant to return to My Folders*

* What would you do if you wanted to delete the kidney folder?

*If the participant needs a reminder about Manage Folder, provide it.*

* What do you expect would have happened if there were messages in that folder? What makes you say that?

*When ready for Task 5:*

Using the scale we showed earlier of 1 being very difficult to 5 being very easy,

* Please rate the difficulty of creating a folder
* Please rate the difficulty of changing a folder’s name
* Please rate the difficulty of deleting a folder

*Follow up:*

* Do you currently use folders in any of your messaging or email systems?
* Do you think having the ability to organize messages in folders is something that may be useful to you?

**Things to watch for:**

* Is participant able to find “Folders” in the nav bar?
* Does participant notice “Create new folder” button?
* Does the participant understand that Edit/Remove would be in “Manage Folder”?
* Is the participant able to locate “Manage Folder”
* Is the participant able to locate “Edit folder name”?
* Is the participant able to locate “Remove folder”?

**Sixth Task: Patient Safety – 5 minutes**

Please click the “Next Screen” link at the bottom of the page. *Assist participant if necessary.*

For this next task, I would like for you to explain what you are doing while you are doing it. Think of how game show contestants think out loud when they are making a decision and do the same.

*Mobile:* When we go to the next screen, I would like you to tell me the first thing you notice, saying why you chose it like a game show contestant, then the second, and the third. For example, on this screen you might say, “I noticed the word wait because it is capitalized and at the beginning of the sentence.” Does that make sense?

*Desktop:* When we go to the next screen, I would like you to use your mouse to point to the first thing you notice, saying why you chose it like a game show contestant, then the second, and the third. For example, on this screen you might say, “I noticed the word wait because it is capitalized and at the beginning of the sentence.” Does that make sense?

Are you ready?

Okay, if you scroll down you will see a continue button. Go ahead and click it.

*After the participant finishes, ask (if they didn’t explain while pointing):*

* Can you tell me why you clicked on [SECTION] first? What made you notice it first?
* Can you tell me why you clicked on [SECTION] second? What made you notice it second and not first?
* Can you tell me why you clicked on [SECTION] third? What made you notice it after the others?

*Continue with these questions as necessary.*

* Do you recall seeing these messages earlier in our session? When?
* What would you tell a fellow veteran about when to expect a response to a message?
* What would you tell them about using messaging in an emergency?

**Things to watch for:**

* Did the participant notice any of the safety messages? Which ones? In what order?
* Did the participant recall seeing the message(s) earlier?
* Did the participant understand the messages?

**Post Task Interview – 5 minutes**

*You can stop sharing your screen now. Assist participant if necessary.*

* What are your thoughts about what we looked at today?
* Any other things that would be good for us to know?

## Thank-You and Closing - 2 minutes

Well 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.

If still need participants, include the following request.

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.

Thank you so much again, and enjoy the rest of your day!

## Emergency Exit

[In the rare case of an emergency during a session, be prepared with an [emergency exit strategy](https://depo-platform-documentation.scrollhelp.site/research-design/Research-Safety-and-Emergency-Exit-Strategies.2143649793.html#ResearchSafetyandEmergencyExitStrategies-Sampleexitstrategies). Plan to include here at least one option, so its easy to find during a session. Take some time to practice so it feels more comfortable.]