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<> Code ⌚ Issues 5k+ 🔗 Pull requests 108 💬 Discussions ⌚ Actions 📁 Projects 29 📖 Wiki 🛡 Security 📈

va.gov-team / products / login.gov-adoption / research / 2023-03-Deferred-Identity-Proofing-Round-1-Usability / conversation guide #2.md 📄

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tygindraux Create conversation guide #2.md ✖

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Conversation Guide #2: Deferred Identity Proofing (Round 1: Usability)

Login.gov Adoption Team, Legacy Credential Migration, February 2023

Last updated by @tygindraux: April 14, 2023

Note: This Conversation Guide will be used to test [Prototype #2](#), where a Veteran receives an email asking them to sign in to VA.gov to start setting up a Login.gov account.

Moderator logistics

2-3 days before the session

- ☐ Review [guidelines for moderators](#)
- ☐ Send [guidelines for notetakers](#)
- ☐ Send [guidelines for observers](#)
- ☐ Ensure prototype(s) are prepared and Perigean will share them with participants

Day of the session

- ☐ Prepare prototype on your device and be ready for screen sharing if necessary
- ☐ Log into the Perigean Zoom meeting (you will be the host).
- ☐ Turn on transcriptions by clicking the LIVE TRANSCRIPT button in the bottom toolbar, then, in the Live Transcription section, click the ENABLE button.
- ☐ Prepare yourself and your space for a video interview by clearing clutter (on screen and around you), ensuring you have good lighting, and muting distractions like Slack notifications.
- ☐ Use headphones.
- ☐ Review goals and research questions for this study in the [research plan](#)

Starting the session

- ☐ If the participant doesn't show up in the first few minutes, reach out to Perigean on Slack.
- ☐ Turn your camera on, but don't require the Veteran to turn their camera on, it's up to them. If they choose to have their camera off, ask if they'd prefer you turn your's off.
- ☐ Where applicable, confirm the participant is able to hear and see you.
- ☐ Go through the consent process slowly and intentionally. Remind the participant of their autonomy and choice.

- ☐ You can only record the session if the participant gives you permission to record. Once you start recording, you must let the participant know they're being recorded and have them acknowledge that they give permission. Remember to hit record to cloud.
- ☐ Ask if participants are okay with notetakers and observers joining the session. If they are, add them to the meeting and ensure they are on camera with their name visible on the screen. Introduce them to the participant. Then, ask all third parties to turn off their cameras so you can begin.
- ☐ Ensure everyone except the participant is on mute.

Agenda - 60 minutes

- Intro: 5 minutes
- Warm-up: 5 minutes
- Task 1 (Email): 10 minutes
- Task 2 (Sign in to VA.gov): 5 minutes
- Task 3 (Create an IAL1 Login.gov account): 15 minutes
- Task 4 (Continue back to the VA): 10 minutes
- Task 5 (Upgrade to an IAL2 Login.gov account): 5 minutes
- Cool down: 3 minutes
- Thank you: 2 minutes

Intro - 5 minutes

Thanks for joining us today! My name is [YOUR NAME] and I'm a researcher at the VA.

I also have a few colleagues in the Zoom waiting room who would like to observe and take notes. But before we invite them, I'd like to tell you more about what we're doing today.

Today we're going to talk about how you sign in to access and manage your VA benefits and health care.

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

- **This entire session should take about 1 hour.** I'd like to make sure I don't take too much of your time, so I may occasionally move us along so we can cover everything we're hoping to talk to you about.
- **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 Veteran's needs. I will not be offended by any opinions you express, and I welcome your feedback.
- **Today, you'll be interacting with a prototype.** This is basically like a pretend version of the website. It might not work exactly how you expect. For example, you'll be able to click on somethings on your screen, but not all of them. We use prototypes to help us test things before we decide what to make real, and what to change.
- **If for any reason and at any time you want to stop the session, please let me know.**
- Perigean did ask for your consent to allow people to observe today, but I'd like to confirm. **Are you okay with a couple of additional observers during this session?**
 - If no: Use Slack to kindly ask the observers to leave the Zoom.
 - If yes: Admit observers.
 - Then, briefly introduce all observers while they keep their cameras on and microphones off. If you have time and prefer to, you can ask the observers and notetakers to introduce themselves instead.
 - Then, ask all observers to turn off their cameras for the rest of the session.
- **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 finish 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 - 5 minutes

I'd like to start by learning more about your experience with the VA and some of our online services.

- How long have you been a Veteran?
- How often do you go online to access and manage your VA benefits and health care?
- Do you remember the last time you signed into the VA online?
- Why were you signing in, that day? [What we're you trying to do, that day?]
- How do you sign in to the VA?
- Why do you use [this method] to sign in?
- Can you describe to me how it usually works when you sign into VA.gov [or eBenefits or MHV]? What do you do first?
- Is there anything else you want to share with me about signing in, before we move on?

Great, thanks!

Things to watch for:

- Does the Veteran recall whether they usually start on VA.gov, eBenefits, My HealtheVet or another VA application?
- Does the Veteran recall using DS Logon, MHV, Login.gov or ID.me to sign in?

Task 1: Email asks to set up Login.gov - 10 minutes

Next, I'd like to share some ideas with you so we can get your feedback.

In a minute, I'm going to send you a link to a prototype. I mentioned earlier that a prototype is like a pretend version of an email or website. So it's going to look similar, but it won't work as you might expect it, because it's not a real email or website.

Okay, I've just sent you a link in the chat. [Help them open it and share their screen].

Screen: Email from VA.gov

Now that you have this open, I'd like you to start by imagining that you've just received this email from the VA.

I'm going to give you a second to read this more closely now. When you're finished, I'd like you to summarize what you read.

- Can you summarize what you just read, for me?
- Do you have any initial questions, after reading this email?
- What is this email asking you to do next?
- In this scenario, would you be interested in setting up a Login.gov account right now? Why or why not?
- What hesitations do you have about setting up a Login.gov account?
- Why do you think the VA is recommending that you set up a Login.gov account?
- If you had a question about anything you read here, what would you do?

Great, we're going to imagine you decide to continue today. You can click 'go to VA.gov to create an account' now.

Things to watch for:

- Does the Veteran appear motivated to set up a Login.gov account when initially prompted?
- Does the Veteran appear hesitant or confident about what they're being asked to do?
- Does the Veteran know where or how to get help if they encounter an issue?

Task 2: Sign in to VA.gov - 5 minutes

Screen: Sign in pop-up window

Great, okay.

- Before we click anything, is this what you expected to see after the email?
- Can you tell me what you would do next?
- How would you sign in?
- Is DS Logon [or other credential they mention] usually how you sign in to the VA?

Great, we're going to imagine you signed in with DS Logon, today. You can click 'sign in' and we'll continue.

Screen: DS Logon sign in page

Let's pretend you put in your username and password. You can click Login, now.

Screen: Redirect page

- Before we read this in detail, can you describe to me what you're looking at, now?
- Why do you think this has appeared on your screen?

I'm going to give you a second to read this more closely now. When you're finished, I'd like you to summarize what you read.

- Can you summarize what you just read, for me?
- Do you have any initial questions, after reading this?
- What do you expect to happen next?
- If you had a question about anything you read here, what would you do?

Things to watch for:

- Does the Veteran use DS Logon (or another credential) to sign in, usually?
- Does the Veteran appear confused at all throughout the sign-in flow?
- Does the Veteran know where or how to get help if they encounter an issue?

Task 3: Create an IAL1 Login.gov Account - 15 minutes

Okay great. For today, let's imagine that you are going to set up a Login.gov account.

Screen: Modal recommending migration

- Before you click anything, can you tell me what you would do first to set up an account?
- Before you click anything, what do you expect to see when you click [repeat what they called it]?

Great, let's go ahead and click 'Set up Login.gov.'

Screen: Create an account start page

As we go through the next couple of screens, I'd like for you to describe out loud what you would do next. If you have a question or something interests you, let me know so we can chat about it.

- What would you do next, here?
- Any concerns?
- If there was an issue on this page, what would you do?

Great. Let's click 'create account.'

Screen: Create your account

- What would you do next?
- Any concerns?
- If there was an issue on this page, what would you do?

Great. Let's click 'continue.'

Screen: Check your email

- What would you do next?
- Any concerns?
- If there was an issue on this page, what would you do?

Great. We're going to imagine that you opened your email address on your [whatever device they're on currently]. You can click 'check email' now.

Screen: Email verification

- What would you do next?
- Any concerns?
- If there was an issue on this page, what would you do?

Great. Let's click 'confirm email address' and continue.

Screen: Create a strong password

- What would you do next?
- Any concerns?
- If there was an issue on this page, what would you do?

Great. Let's click 'continue.'

Screen: Multi-factor authentication start page

- Can you describe this page to me?
- What would you do next?
- Which option would you choose?
- Any concerns?
- If there was an issue on this page, what would you do?

Great, thanks. You can go ahead and choose [whichever option they lean towards, or, suggest text message]. We'll continue and set that up.

Screen: MFA set up screen(s)

- What would you do next?
- What do you think will happen if we click 'send code'?
- Any concerns?
- If there was an issue on this page, what would you do?

Great. [If applicable: Let's click 'send code,' and imagine you are sent a code.]

Screen: Enter your security code

- What would you do next?
- Any concerns?
- If there was an issue on this page, what would you do?

Great. Let's click 'submit.'

Screen: You've added your first authentication method

- What would you do next?
- Any concerns?
- If there was an issue on this page, what would you do?

Great. For today, we're going skip setting up another method.

- Can you tell me how you would skip setting up an additional method?

Great. Let's click 'skip for now.'

Screen: Your account setup is complete

- When you see this screen, what do you think this means?
- Before you click anything, what do you expect to happen when you click 'agree and continue'?
- If there was an issue on this page, what would you do?

Things to watch for:

- Does the Veteran understand how to initiate the account setup flow?
- Does the Veteran understand how to start their account creation, by entering their email address and creating a password?
- Does the Veteran understand how to verify their email address and what's involved?
- Does the Veteran face any issues through multi-factor authentication setup?
- Which multi-factor authentication method would the Veteran choose?
- Does the Veteran know where or how to get help if they encounter an issue?

Task 4: Continue back to the VA - 10 minutes

Great. Let's click 'agree and continue.'

Screen: Continue to VA

- What does this screen mean to you?
- What do you expect to happen next?
- If there was an issue on this page, what would you do?

Great. Let's click 'agree and continue.'

**Screen: (Back on VA.gov) You've successfully signed in with Login.gov*

Okay. Before we talk about this screen, I'd like to reflect on what just happened.

- In your own words, can you tell me what we just did?
- Do you have any concerns about what just happened?
- What website are you on now?
- Why do you think you're on [however they describe VA.gov] now?

I'm going to give you a second to read this screen now. Then, I'd like you to summarize to me what you read.

- Can you summarize what you just read?
- What is this screen trying to tell you?
- If there was an issue on this page, what would you do?

Now, you'll remember that when we started today, we imagined you were online to [reference the task they're doing today on VA.gov].

- Do you have any concerns about your ability to [do that task] now?

Things to watch for:

- Does the Veteran understand how and why they are returning back to the VA after setting up their account?
- Does the Veteran understand they are now signed in with Login.gov?

- Does the Veteran have any concerns about their data or information, after going through that process?
- Does the Veteran have any concerns about their ability to continue accessing VA services, now that they have a new login method?
- Does the Veteran that they have set up a Login.gov account to use in place of DS Logon moving forward?
- How does the Veteran understand what type of account they have set up with Login.gov (and its limitations)?
- Does the Veteran know where or how to get help if they encounter an issue?

Task 5: Upgrade to IAL2 - 10 minutes

We're nearly done today, thank you for answering so many of my questions already.

Next, please close this pop-up [click 'close' or anywhere outside of modal].

Screen: VA.gov homepage (signed in)

Now, please click anywhere on your screen. And we'll move on the last task.

Screen: VA.gov homepage (not signed in)

I'd now like you to imagine that it's been a couple months since you set up your Login.gov account. So you come back to your computer and you're going to sign in to VA.gov.

- Can you show me how you would sign in to VA.gov this time?

(You can go ahead and click "Sign in" now.)

Screen: Sign in pop-up window

- Which sign in method would you use this time? Why?

(You can go ahead and click "Login.gov" now.)

Screen: Login.gov sign in

- What would you do here?

We'll imagine that you enter in your username and password, and you can go ahead and click sign in.

Screen: Modal recommending upgrade to IAL2

Okay, now you see this screen.

- Before we read this in detail, can you describe to me what you're looking at, now?
- Why do you think this has appeared on your screen?

I'm going to give you a second to read this more closely now. When you're finished, I'd like you to summarize what you read.

- Can you summarize what you just read, for me?
- Do you have any initial questions, after reading this?
- Would you be interested in upgrading your account? Why or why not?
- Why do you think the VA is recommending that you upgrade your Login.gov account?
- If you choose not to upgrade your Login.gov account, what do you think will happen?
- If you had a question about this screen, what would you do?

Things to watch for:

- Does the Veteran that they have set up a Login.gov account to use in place of DS Logon moving forward?
- Does the Veteran appear motivated to upgrade to an IAL2 Login.gov account?

- Does the Veteran understand why they're being asked to upgrade (based on how well they understand their current account)?
- Does the Veteran have any concerns about their ability to continue accessing VA services, after seeing this screen?
- Does the Veteran know where or how to get help if they encounter an issue?

Cool down - 3 minutes

We covered a lot today. I'd just like to spend a couple minutes now reflecting, before we wrap up.

- Can you summarize what it is you did today, as you clicked through that prototype?
- Out of everything you looked at today, is there anything that sticks out to you now? [This might be something particularly confusing, or interesting]
- Is there anything we could do to make it easier for you to set up a Login.gov account, to use at the VA?

Great, thank you! Those are all of the questions I have for you today.

- Do you have any questions for me?

Thank you - 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.

Before you go, I do want to make sure it's clear that everything we did today wasn't real. So you haven't actually set up a Login.gov account or changed the way you sign in to the VA. You can continue to do that as normal.

Thanks! Lastly, Perigean will be sending you a thank you note with a little blurb that you can pass along to other Veterans you may know to provide them the chance to participate in future research studies.

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

Emergency exit

Out of questions: We have covered all the questions I have for you today. Thank you so much for your time and feedback.

Blame technology: I'm so sorry, but I just learned that the prototype we'll be reviewing today is unexpectedly not working. I apologize for the inconvenience and thank you for your time.

These are based on recommendations from the [VA platform documentation](#).