**P1**

**Conversation Guide: Pre-Need Eligibility Determination Application (VA Form 40-10007), Usability Research of Integration Enhancements, August 2023**

**Moderator logistics**

* *Use #feedback-backchannel in Slack for real-time feedback from observers.* [In this study, we will be using the designated Teams channel to facilitate communications with stakeholders.]
* *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)*).*
* *Mute your Slack and computer notifications.*
* *Share the GitHub participant doc with Perigean for notetaking.*

**Before you start the session**

* *Make sure everyone except the participant and moderator are on mute.*
* *In the Participant window, tap the More drop-down arrow and make sure "Play join and leave sound" is unchecked.*
* *Check your [screensharing setup]. Make sure you are setup on Zoom app and ready to screenshare in case participant can't.*
* *When the participant is ready, begin the session with the following intro.*

**Project-Specific Setup and Intro - 10 minutes**

* *[Moderator turns on camera. Waits to admit observers until consent is received from participant]*
* Thanks for joining us today! My name is Charlie and I'm a designer for VA.gov. I also have a colleague on the line, Cindy, observing and taking notes. Today, we're going to review a prototype of the VA Pre-Need application for eligibility determination at a VA national cemetery. We're working on improvements to the form, so it's important that we get feedback from users.
* This entire session should take about 45 minutes or less. I want to be sure not to keep you much longer, so I may occasionally prompt you with the next question.
* You'll be taking a look at a prototype of the application. This prototype is basically made up of images or mockups so none of your actions will affect your actual VA information or benefits and none of your details are collected at any point or associated to your comments. As you click through the prototype, the fields will prefill with test data.
* If, for any reason and at any time you want to stop the session, please let me know. You'll be compensated no matter how much of the session we complete.
* Perigean did ask for your consent to allow other observers, but I want to be sure before we get going. **Are you okay with a couple of additional observers during this session?**
* ***If no:*** *Use Slack/Teams to kindly ask the observers to leave the Zoom.*
* ***If yes:*** *Admit observers.*
* *Then, ask the notetaker and observers to give a brief, introduction, like their first name and position with VA.gov. (This is meant to humanize the interaction of observation for the participant)*
* *Once complete ask notetaker and observers to turn off their cameras for remainder of the session to save bandwidth. Moderator can turn off camera.*
* Are you on a desktop, mobile or tablet device?
* (On the iPhone)
* I'm going to send you a link in the chat that I would like for you to open.

[Integration v0.1 InVision Prototype Link](https://bahdigital.invisionapp.com/console/share/6DUFGR3ZVMN) {link}

* Okay, now I'm going to ask you to share your screen in Zoom so that we can look at the prototype together and then we'll begin.
* **Zoom screensharing on desktop:** Locate green Share Screen button on the bottom tool pane.
* **Zoom screensharing on mobile:** Locate Share button in bottom tool panel (it's scrollable and they may need to scroll to see button if off screen), then hit "Start broadcast".

**If they have trouble locating the chat or with sharing, talk them through finding the chat window to locate the prototype link and the Zoom screen sharing features.** [Zoom share screen directions](https://support.zoom.us/hc/en-us/articles/201362153-Sharing-your-screen-or-desktop-on-Zoom)

*Can actually do this while explaining to them where to find “Chat” and “Share,” so by the end we're looking at their screen, then move onto recording.*

**Backup plan if they cannot figure out how to share screen:**

Ok, it seems like we're having some trouble getting the prototype up on your screen. I'm really excited for you to participate though, so what we're going to do today is have me share my screen, and then I'm going to have you "Drive". You can tell me what to do, what to tap, on, etc. Does that sound ok?

* [Share your screen]. Can you confirm if you can see my screen?

////// **Recording Instructions** //////

* 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.
* **If no:** That's ok. We can use our notes to complete our analysis.

*If yes, start recording to the Cloud.*

* I have started recording. I'd like to confirm: Are you comfortable if I record my screen and audio as we talk today?"
* Ok. Now we're ready to begin!

**Warm-up Questions - 5 minutes**

* To start, I'd like to ask you a few warm-up questions. (Husband was 100 disabled Veteran, she is the widow)
* Can you briefly tell me about your background with the military? [Determine if they're a Veteran, family member, or a personal representative]
* Did you know that you could apply to see if you're eligible to be buried in a national cemetery? - If so, how did you find out?

(Already eligible and has tried. Her husband was diagnosed with a terminally illness and she found out this way)

* What do you think qualifies you to be buried in a national cemetery?
* (Being a widow of a disabled veteran, missing in action, or prisoner of war)
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery? (Kentucky State Veterans Cemetery her husband is buried in)
* Have you applied before to see if you're eligible for burial in a national cemetery?  (Yes)
* If Yes: Could you describe how that process went and your thoughts about it?
* If No: Is that something you would be interested in doing at some point?

**Getting Started - 1 minute**

* When applying to see if you're eligible for burial in a VA national cemetery, the VA Pre-Need application can be used. I'm going to give you a scenario for you to walk through a prototype of this application and give us your thoughts.
* The prototype link I shared is a work in progress, so there might be a few mistakes, or it may not function exactly the way you expect, which is ok. Some areas will be clickable and some will not and some fields will fill in when you click on them.
* While you're going through the scenario, it would be really helpful if you'd think aloud - kind of like you'd do if you were talking to yourself. We are interested in your first reactions, what you're thinking & wondering as you go through the process. The more you say about what you are thinking and wondering, the more we’ll learn, so we want to hear your honest opinions. We're not testing your abilities. We just want to improve the form to better meet Veteran's needs. We won't be offended by any opinions you express, and we welcome your feedback.
* When you think aloud, it helps us understand what works well and where we might want to make improvements to make things even easier. If you have questions, it’s likely that many other Veterans will, as well, so feel free to ask them along the way.

***Note:*** *Each participant will go through* ***ONE*** *of the tasks below.*

**Task 2: Applying for Self - Applicant is a non-Veteran - 15 minutes**

* **Scenario:** For your scenario, pretend that you are Robin Smith. You are married to a Veteran. You want to plan for the future and apply for yourself to see if you're eligible for burial in a VA national cemetery. Your spouse is sponsoring your benefits. How would you go about filling out this application for yourself? In this example, you are already signed in to VA.gov. I'm going to briefly have you take a look at this information page before you start the application.

*When participant clicks on the green button to apply, repeat the scenario:*

* **Scenario:** I'll repeat the scenario again: Pretend that you are Robin Smith. You are married to a Veteran. You want to plan for the future and apply for yourself to see if you're eligible for burial in a VA national cemetery. Your spouse is sponsoring your benefits. How would you go about filling out this application for yourself? In this example, you are already signed in to VA.gov.

Questions to ask as they go through scenario

(She mentioned wanting more about the information page, would click on additional links)

**Introduction**

* What are your thoughts regarding the content on this page?
* Do you feel prepared to start applying?
* *Things to watch for:*
* Does the user feel the need to click on external links?
* Does the user try to open the Privacy Act Statement before continuing?

(Went through quickly on this one. Cindy will rewatch recording for content valuable)

**Step 1 of 7: Preparer information**

**Self or someone else?**

* *Things to watch for:*
* Observe if user has difficulty answering applying for self or someone else field (should select Applying for Self)
* Does the user feel the need to open the additional info component? (No)
* If they have difficulty, could ask: What are you leaning towards selecting here? Why?
* (Got through quickly and understood things)

**Step 2 of 7: Applicant information**

* **Applicant relationship to service member / Veteran**
* What do you think this question is asking?
* What are your thoughts regarding the available options? (should select Wife)
* *Things to watch for:*
* Does the user feel the need to open the additional info component?
* Does the user experience any confusion in reading details? (Need to scroll to bottom of page)\_
* (Got through quickly)
* **Applicant details**
* *Things to watch for:*
* Do they understand they would need to provide their details here (Robin Smith)?
* Does the user show any confusion with two new birth fields?
* (Understand the differences and brought back the differences on the previous screen)
* **Applicant's mailing address**
* *Things to watch for:*
* How do users react with applicant address/contact page being moved to this new location?
* (Moved fast)

**Step 3 of 7: Sponsor information**

* **Sponsor details**
* What are your thoughts regarding whose details you'll need to provide here?
* (She would have all this, know all this. No issues)
* **Sponsor's mailing addres~~s~~/contact details**
* *Things to watch for:*
* How do users react with sponsor address/contact page being moved to this new location?
* (Got through quickly)
* ***Sponsor demographics***
* *Do you have any thoughts regarding the questions and options available here?*
* *Is there anything you would change?*
* *Things to watch for:*
* *How do users react to answering potentially sensitive questions?*
* *(Would have chosen widow, but understood)*
* **Sponsor demographics**
* Do you have any thoughts regarding the questions and options available here?
* Is there anything you would change?
* *Things to watch for:*
* How do users react to answering potentially sensitive questions?
* How do they approach Other Category Comment field?
* (Answering fast and moving quickly)
* **Sponsor's passing**
* *Things to watch for:*
* How do users react to answering potentially sensitive questions?
* *If YES, move on to Sponsor’s passing date\*\*\**
* *(Yes quickly l)*
* ***Sponsor's passing***
* *Do you have any ill feelings towards providing the passing date here.*
* *(Filled quickly)*

**Step 4 of 7: Sponsor military history**

* **Sponsor's military details**
* Are you familiar with the military status dropdown options?
* Would you know what to provide for these fields? If not, how would you get that information?
* (Moving through quickly)
* **Sponsor's service periods**
* Would you feel prepared to answer these questions about your sponsor or would you need to look them up?
* What would you do if you didn't have this information on hand?
* For the discharge character of service options, are you familiar with those?
* (Moving through quickly)
* *Things to watch for:*
* Would they be able to add multiple service periods for their sponsor?
* **Sponsor's previous name** -*Have them select YES*
* *Things to watch for:*
* Do they understand what this field is asking?
* (Understood)
* ***Sponsor's previous name\*\*\****
* *Does the language make sense here?\*\*\**
* *(Understood)*

**Step 5 of 7: Burial benefits**

* **Previous Decedents**
* Would you understand what this question is asking about your sponsor?
* *Have them select YES*
* If they don't understand: Is there a different way you would ask it?
* *Things to watch for:*
* Do they understand what this field is asking?
* (Got through fast)
* ***Previous Decedents***
* *What do you feel when you read these field labels?*
* (Fast and understood)
* **Desired cemetery**
* Do you have something in mind for where you'd like to be buried?
* If they don't: How would you go about finding a cemetery?
* *Things to watch for:*
* Does the language in the note make sense to them or do they express any concerns?
* (Fast and understood)
* (Throughout difficult to say she s reading it)

**Step 6 of 7: Supporting files**

* **Upload supporting files**
* Do you think you would need to upload something here to continue?
* What do you think you could provide to help your application process?
* How would you go about uploading a file if you're on a mobile device?
* What are your thoughts regarding the allowed file type for PDFs?
* (Maybe DD12 for allowed uploads maybe marriage certificate, maybe death certificate)
* (Don’t know about uploading with phone, Google Drive)
* (Was figuring out uploading a bit)

**Step 7 of 7: Review application**

* What would you do at this point?
* (Not looking at accordions and read and accept)

**Confirmation**

* What would you do at this point?
* When do you think you would get a decision?
* Is there anything that would be helpful to see at this point once you've submitted
* (Would go through quickly and print)
* *Have them click After You Apply link*
* **After you apply**
* *Have them briefly look at page to get their thoughts*
* (Would go through this part with ADD brain. Would screenshot if you quality for burial section. Spending a lot of time on this page. Would save this page. Relatively new widow and could only do a certain amount at a time)

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

Wonderful! Thank you so much for walking through that with us and telling us your thoughts. We just have a few questions to ask before we wrap up our session for today.

* What did you think of the application process overall? (Fast had mental black bigger than it required in real life. Relatively easy and smooth)
* On a scale of 1 to 5 with 1 being the lowest and 5 being the highest, how would you rate the application process for Pre-Need that you just experienced?  (5)
* On a scale of 1 to 5, how mobile-friendly do you think it is? (3 with going that fast. It seemed like skipping pages and just the ease of jumping to new pages (just the prototype))
* If you could snap your fingers and recreate the application process for pre-need to make it better, what would that process look like? (Nothing)
* How would you do things differently? (Nothing)
* Is there anything else on your mind that we didn't ask? (No)
* I'm going to ask my colleage [Charlie or Cindy] if they have questions at this time **Only if there are observers:** and also check the channel to see if any of our observers have any questions. [Check Teams chat for questions]
* Do you have any questions for me?

(She just had to do this within the last year which is why it was faster and had experience doing so. Same with documents)

(After death there’s a lot there’s to do with agencies and creditors and it’s done through autopilot. It’s clinical, black and white. Can upload form but have to screenshot for later. Can go back and process later)

**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 VA.gov Pre-Need application to make sure that it really works for Veterans.
* Thanks so much! 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!

**STOP RECORDING**

* **Ask observers for top takeaways after participant has dropped and, as a group, note participant quantitative results.**
* (Didn’t read and got through quickly.)

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.]**