**P3**

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

(Note with time purposes, using the previous T4 task)

**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? (Laptop windows 10)
* 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.
* Can you briefly tell me about your background with the military? [Determine if they're a Veteran, family member, or a personal representative]( United States Army infantry, joined at 36, basic training at 37, made in in 3 years 18 weeks but with a back injury)
* 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? (Not yet but occasionally brought up topic with wife. Need to look at now with wife)
* What do you think qualifies you to be buried in a national cemetery? (20 year service, retired)
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery? (Neither one has anything in mind, no plans)
* Have you applied before to see if you're eligible for burial in a national cemetery? (No)
* 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? (Yeah, in the near future)

**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 4: Applying for Someone Else - Applicant is a non-Veteran - 20 minutes**

* **Scenario:** For your scenario, pretend that you are Sammy Smith. You're a navy Veteran, and you have a disabled adult dependent son who is 20 years old. Your aren’t the applicants sponsor. You want to plan for the future and find out if your adult son is eligible for burial in a VA national cemetery under your benefits. How would you go about filling out this application? 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 Sammy Smith. You're a navy Veteran, and you have a disabled adult dependent son who is 20 years old. You want to plan for the future and find out if your adult son is eligible for burial in a VA national cemetery under your benefits. How would you go about filling out this application? In this example, you are already signed in to VA.gov.

Questions to ask as they go through scenario

**Information page**

(Clicks links, reads thoroughly, learned in eligible, if daughter or son is discharged, I’m in charge of all their responsibilities. Clicks on get more eligibility link.)

(Want something closer to the house for cemeteries in Florida)

(Brought up specifics around burial with being placed within the wall)

(Familiar with service periods and always keeps discharge papers)

(I’d talk to wife but also reach out to a VSO at this point. Would check about eligibility and would do this for expediency. Govt websites can be confusing designed with business mindset.)

(Not thinking bureaucracy with personal burials)

**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?
* (Scrolls through content.)
* (If I need help, talk to my wife with 1000000 questions.)
* (When about to apply, would call wife in)
* (\*What we need is interesting)

**Step 1 of 7: Preparer information**

* *Things to watch for:*
* Observe if user has difficulty answering applying for self or someone else field (should select Applying for Someone Else)
* Does the user feel the need to open the additional info component?
* If they have difficulty, could ask: What are you leaning towards selecting here? Why?
* (Fast and understood)
* **Preparer details**
* Whose name do you think would need to be noted here?
* Things to watch for:
* Do they understand they would need to provide their details here as the preparer (Sammy Smith)?
* (Loves prefilled and understands)
* **Preparer's mailing address/contact details**
* Things to watch for:
* Do they understand they would need to provide their details here as the preparer?
* (Nice with the understanding)

**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 Adult Dependent Son)
* *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)\_
* (Understood drop-down)
* (Clicks on additional info and reads)
* **Applicant details**
* *Things to watch for:*
* Do they understand they would need to provide their details here (Robin Smith)?
* (The VA would have info on the Veterans spouse information (x versus applicant)
* **Applicant's mailing address**
* *Things to watch for:*
* How do users react with applicant address/contact page being moved to this new location?

**Step 3 of 7: Sponsor information**

* ***Applicant’s sponsor***
* *Do you understand what a sponsor is?*
* *Have them select YES, to align with the scenario*
* *(Would go back and fill in sons information for the applicant earlier.)*
* *(Would come back and grab wife.)*
* *(Thinks the sponsor is the wife)*
* **Sponsor details**
* What are your thoughts regarding whose details you'll need to provide here?
* Does the user show any confusion with two new birth fields? (Would be)
* **Sponsor's mailing address/contact details**
* *Things to watch for:*
* How do users react with sponsor address/contact page being moved to this new location?
* **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?
* (No thoughts)
* **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?
* (Other would be other racial or ethnic identity)
* **Sponsor's passing**
* *Things to watch for:*
* How do users react to answering potentially sensitive questions?
* (Confused with sponsor terminology thought sponsor was the applicant.)

**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?
* (Older Vets had actual service numbers. Older generation used social. VA claim number I don’t know. Would have to come back and fill in before submitting. All info helps speed things up)
* **Sponsor's service periods**
* Would you feel prepared to answer these questions about your sponsor or would you need to look them up? (Yes)
* What would you do if you didn't have this information on hand?
* (Call wife or dig through paperwork. Would find DD214)
* For the discharge character of service options, are you familiar with those? (Yes with all.)
* *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?
* (Yes)
* ***Previous name***
* *Things to watch for:*
* *Do they understand what this field is asking?*
* *(Yes)*

**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?
* (Someone already is using wife’s benefits so yes I do understand)
* ***Previous Decedents***
* *What do you feel when you read these field labels?*
* *(/)*
* **Desired cemetery**
* Do you have something in mind for where you'd like to be buried?
* (Applicant is disabled son so looking where to bury his son when he passed)
* (Id have a cemetery close to my house in mind)
* 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?

**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?
* (All military docs are already upload on computer. Would upload files from there)
* (I’d know DD214 is the primary, my wife’s SSN, her details, and that’s the contact with the VA.)
* (On a mobile device, if need to go to GoogleDrive, select and upload)
* (PDF is what I prefer as it’s universal. There are differences with Microsoft and Apple in this way)

**Step 7 of 7: Review application**

* What would you do at this point?
* (Opens accordions. Would scroll through and double check one step at a time. Would contact wife before submitting and submit later if she wasn’t there. Don’t know if it would trigger something at the VA. Would want to make sure everything was correct. Would have her look and take care of it or look together through).

**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
* *Have them click After You Apply link*
* (Would print and save as PDF on phone)
* (Within two months for a decision)
* (Would click on after you apply page)
* (Add in What’s the expected timeline before What happens after I apply? Depending on the office timeline and how long it might take. They’ll know when to follow up.)
* **After you apply**
* *Have them briefly look at page to get their thoughts*

**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? (Very user friendly, better and cleaner than other VA websites. Straightforward. Likes information along the way anticipating.)
* 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? (5, smoothly, nice font size, clear color schemes)
* If you could snap your fingers and recreate the application process for pre-need to make it better, what would that process look like? (Mindset of people in grief working at Arlington and funeral home, you are pulling their brain from a billion different areas into one main task. Would feel relieved that it was easier than anticipated)
* How would you do things differently? (Define the terms in the beginning for applicant sponsor preparer. Who’s who and what’s what. Applicant versus sponsor)
* Is there anything else on your mind that we didn't ask?
* 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?

**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.**

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.]