**P8**

**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?
* 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] (Veteran woman spouse)
* 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? (No)
* What do you think qualifies you to be buried in a national cemetery?
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery? (Being a veteran serving honorably )^
* Have you applied before to see if you're eligible for burial in a national cemetery? (Hadn’t thought about it being buried but dad is)^
* If Yes: Could you describe how that process went and your thoughts about it? Yes
* 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 3: Applying for Someone Else - Applicant is a Veteran - 20 minutes**

* **Scenario:** For your scenario, pretend that you are Sammy Smith. You are filling out the form on behalf of Robin Smith, who is a Veteran. You want to help Robin plan for the future and apply for them to see if they're eligible for burial in a VA national cemetery. 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.
* (Straight forward, getting to do it and getting through paperwork initially was difficult. Having it online is a lot easier. Not reading page by page. Having details is easier with notes too.
* (It’s nice having Arlington info there and it’s straight forward with person having into helping. Getting digital info is nice to have now.)
* (Where would I start?)

*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 are filling out the form on behalf of Robin Smith, who is a Veteran. You want to help Robin plan for the future and apply for them to see if they're eligible for burial in a VA national cemetery. 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

* **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?
* (Good to know uploading DD214 makes it go faster. Good to know having help filling the form is there as well as the Apply details.
* **Step 1 of 7: Preparer information**
* **Applying for 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 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 through it)
* **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)?
* (Fast through out)
* **Preparer's mailing address/contact details**
* *Things to watch for:*
* Do they understand they would need to provide their details here as the preparer?
* (Fast through it)
* **Step 2 of 6: Applicant information**
* **Applicant relationship to service member / Veteran**
* What do you think this question is asking?
* What are your thoughts regarding the available options?
* *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)\_
* (Confusion around applicant question. Also the options provided.)
* (How is the Veteran or service member related to you? Recommendation)
* **Applicant details**
* *Things to watch for:*
* Do they understand they would need to provide the applicant details here (Robin Smith)?
* Does the user show any confusion with two new birth fields? (No)
* (Understood veterans)
* **Applicant's mailing address**
* *Things to watch for:*
* How do users react with applicant address/contact page being moved to this new location?
* (She’s okay)
* **Applicant demographics**
* Do you have any thoughts regarding the questions and options available here? (No, these are standard options)
* 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?
* (Put in something that’s not in the list)
* (Ethnicity is tricky, with first ethnicity then the categories being White and Latino)
* **Step 3 of 6: Applicant military history**
* **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?
* (Yes familiar, but before gulf war the numbers were different being based on each other. The VA claim number comes from two different resources, one being VA.gov.)
* **Service periods**
* Would you feel prepared to answer these questions 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?
* *Things to watch for:*
* Would they be able to add multiple service periods?
* (I would get this info from the first page of the DD214)
* (Aware of discharge options)
* **Previous name** -*Have them select YES*
* *Things to watch for:*
* Do they understand what this field is asking? (Yes)
* **Step 4 of 6: Burial benefits**
* **Previous Decedents**
* Would you understand what this question is asking?
* *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?
* **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?
* (Would look at statewide first, then find VA cemetery link to see what’s available.)
* **Step 5 of 6: 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?
* (Applying for self. Applying for someone else. Which one do they select and read?)
* (Straightforward with uploading)
* (Download on comp, save it yourself, then move it to file documents, or you have to go back to desktop and get through e benefits to upload)
* (Fine with PDF files being uploaded)
* **Step 6 of 6: Review application**
* (Always double check for errors in information)
* (Has seen wrong info submitted delay processing times and had to get on the phone
* **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*
* (Usually, text screenshot or send text to self for the page)
* (4-6 weeks)
* (Got confirmation, got print page, info for how to contact NCA center. Plan on calling soon to see where they’re at)
* **After you apply**
* *Have them briefly look at page to get their thoughts*

(A lot don’t know about the amount of money given from the government. What’s a burial liner?)

(A lot don’t know about survival benefits)

(I like the form to fill out for headstone)

(Can you make sure VA info is up to date on e-benefits?)

(Does the info and after you apply page affect the ratings)

**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? (Great, very detailed with minor changes in wording)
* 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? (4.5)
* On a scale of 1 to 5, how mobile-friendly do you think it is? (5)
* If you could snap your fingers and recreate the application process for pre-need to make it better, what would that process look like? (Reading material to put around VA centers for next appointment or sending something in the mail concerning the app and what it does. Mail out to service members to let them know it’s there. Maybe giving it to DAV newsletter within app and benefits)
* How would you do things differently?
* Is there anything else on your mind that we didn't ask?
* I'm going to ask my colleague [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?

(With downs it’s nice to have the ability to have mobile and laptop choices)

**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.]