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

**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] It’s actually my husband who was the person who was in the military. He was in the Navy.
* 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? I assume all veterans of war are eligible. Aren’t we?
* What do you think qualifies you to be buried in a national cemetery? [husband answered instead] The fact that I’m a veteran of a foreign war. I spent a year in Vietnam and two other years on a ship patrolling up and down a coast… and I have a cripple neuropathy in my hands from agent orange. so I think that qualifies me for everything.
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery? [husband answered instead] It’s pretty much up to my wife. I won’t be here then. It’s ok if they, I awnt part of my ashes to be spread in Puget sound, but the rest of them can go down to fort logan. I know I have a right to be buried there.
* Have you applied before to see if you're eligible for burial in a national cemetery? No, we have not.
  + 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? Yes.

**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.
* **P:** it seems pretty straightforward. Prepare before starting, ok.
* **M:** if you’d like me to select any of the links, let me know. Too
* **P:** find out how to schedule a burial. That’s something I’d [select]…. That seems pretty straightforward. A spouse, dependent. So in other words I could also fill one of these out for myself after he’s passed away?
* **M:** would that be helpful?
* **P:** yes, it would. We base our decision on the service history of the veteran. That’s pretty clear. I think it’s pretty clear, those 3 paragraphs.
* **M:** at this point, what would you do?
* **P:** I’d click on find a va national cemetery, although I know there’s one.. fort logan, not too far from us. Find a state veteran [cemetery] oh, I didn’t even know they had a state veteran [cemetery]. So I’d click on that. But I wouldn’t want to take him that far from home anyway. Getting a pre-need doesn’t guarantee you’ll be buried in a va national cemetery. We don’t take reservations! Haha. So you apply for it and they could bury you anywhere? That’s interesting. [saw that she would need her veteran’s dd214]… so far, it’s pretty self-explanatory. I think I could do this pretty much on my own. How do I apply?
* **M:** so you feel prepared to apply?
* **P:** yeah. I’m pretty good about applying online. Sometimes it confuses me when I try to apply online, but I would try to do the apply online for pre-need eligibility, but if I get desperate, I’d mail it. Me and the post office are friends.

*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**
  + P: let’s start with the pre-need eligibility application. [m clicked it]
  + 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?\_
* **Step 1 of 7: Preparer information**
  + **Applying for self or someone else**
    - P: then you would, she’s trying to help… am I robin? Robin is the veteran.
    - M: you are Sammy smith, and you are filling out the form on behalf of robin, who is the veteran.
    - P: ok, so I’m applying for someone else.
    - M: then what would you do?
    - P: I’d click on what to know if you’re applying for someone else. Ok. I guess if neither one of these fit, then you’d have to go back and say, they’d have to apply for themselves, but if Robin had a disability, decision making [difficulties] and things like that, you’d still want to go ahead and you could finish the application later. It doesn’t give you a choice.
    - M: at this point, continue?
    - P: yes, I’m sorry. I would have figured this out sooner or later.
    - *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?
  + **Preparer details**
    - P: Then you would fill in their name, Robin’s name, because you’re filling it in for someone else.
    - M: you understand you’d need to put your name here?
    - P: no, because I thought you were filling it in for someone else. I know it says “your first name”. you might want to emphasize “your”
    - M: [moved to address page]
    - 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)? [no, they thought it would have to be the Veteran’s name since they are filling out the form for them]
  + **Preparer's mailing address/contact details**
    - P: then you’d put in your street address, city, state, postal, and then your phone number. And then your email address. I’d probably click on why do we need contact details? I’d like to get the whole picture. Ok, then continue.
    - *Things to watch for:*
      * Do they understand they would need to provide their details here as the preparer?
* **Step 2 of 6: Applicant information**
  + **Applicant relationship to service member / Veteran**
    - P: what is the applicant’s relationship to the veteran? Then you would click on spouse, or wife. [M showed her the options]
    - What do you think this question is asking? P: I would click down to see what they, and then put spouse for me or wife.
    - M: ok
    - P: if I was filling it out for Sammy, I would click on if the applicant is not a service member or veteran, and I’d open it up and check. Now those are pretty self-explanatory [additional info copy]. [P thought the question was asking what is their relationship to the veteran they’re applying for]. [She gravitated towards the spouse/surviving spouse language] That gives you the definitions of all things. There wasn’t something to choose.
    - 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)\_
  + **Applicant details**
    - P: now I’m filling it in for Robin. We’ll say Robin is mister. Well, I don’t know. It says maiden name. SSN is required, so you want that.
    - M: do you understand…?
    - P: yeah, it’d be where he was born. It’s pretty self-explanatory.
    - *Things to watch for:*
      * Do they understand they would need to provide the applicant details here (Robin Smith)? [Yes, they understood it would be his details here, but she got confused when she got to the mailing address page (next)].
      * Does the user show any confusion with two new birth fields? [No confusion with two new fields]
  + **Applicant's mailing address**
    - P: I’m filling it out for him, so I’m the applicant, right? But then we’re married, so we live in the same place. So fill out the street address, and the city and all of that. Our phone number and our email address. We looked at that, so then we would continue.
    - *Things to watch for:*
      * How do users react with applicant address/contact page being moved to this new location?
  + **Applicant demographics**
    - P: [read disclaimer at top] What’s the applicant marital status? Married, you’d mark one of those.
    - M: in this case, they’re going to both be prefer not to answer.
    - Do you have any thoughts regarding the questions and options available here? P: some people prefer not to, like if it’s a gay couple or something like that, they might not be comfortable letting other people know. But people like me, I would have no issues. “normal people, or abnormal” [Note her husband had chimed in to comment that] No, not normal. I like it that way. I’ve had questions where they ask things, and you’re like, but this isn’t the right answer. So if you have something like that, you leave the quandary for the person to fill out. So I like something like that.
    - P: [ethnicity] a lot of people would do prefer not to answer. Which category…
    - M: in this case it’s going to be other.
    - Is there anything you would change? P: No, I don’t think so.
    - *Things to watch for:*
      * How do users react to answering potentially sensitive questions?
      * How do they approach Other Category Comment field?
* **Step 3 of 6: Applicant military history**
  + **Military details**
    - P: if it’s me filling it out, I would fill out, “Other”.
    - 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? P: I know his social. I would know his real service number. I wouldn’t remember that…. [would get dd214] or I would ask help from a service officer.
  + **Service periods**
    - P: that one I know [branch] I actually know that one [rank]. Us navy, and his rank was engineman 3rd. em3.
    - Would you feel prepared to answer these questions or would you need to look them up? P: no, not really. Is that on your..? [would struggle with the dates] I would only know that his service ended in ’68, but I wouldn’t know the month and the day.
    - 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? P: yes, he was honorably discharged.
    - *Things to watch for:*
      * Would they be able to add multiple service periods?
  + **Previous name** -*Have them select YES*
    - P: did the applicant serve under another name? No, he did not.
    - M: in this case, we’re going to select Yes.
    - M: do you understand what this question is asking?
    - P: yeah, they want to know what his real first name is. He gets called Dave sometimes when it’s David. That’s not required, so I would continue. [suffix]
    - *Things to watch for:*
      * Do they understand what this field is asking?
* **Step 4 of 6: Burial benefits**
  + **Previous Decedents**
    - P: [read field]
    - Would you understand what this question is asking? P: not totally. I guess it’s asking if there’s anybody else buried with the same name? like if he was named after his dad and his dad was buried in a national cememtery?
    - [deceased person] P: I would assume it would be the first name, as Robin. Or am I wrong? Sammy?
    - *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**
    - P: oh, ok. So it would ask you where you prefer. So we’d say ft. logan.
    - Do you have something in mind for where the applicant would like to be buried? P: yes.
    - M: what would you do now?
    - P: I’d look to see what other national cemeteries are somewhere around the area where I live. So I would click on that highlighted area [cemetery link] and see if there was another one, and if there wasn’t, then I would just continue.
    - 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 5 of 6: Supporting files**
  + **Upload supporting files**
    - P: I would click on can I mail or fax files because im not very good at uploading. [opened help text for that] ok, that’s pretty self-explanatory. I see they give guidelines for uploading, but…
    - Do you think you would need to upload something here to continue? P: no, I don’t think so, no, because you said if you’d like to fax it somewhere else.
    - What do you think you could provide to help your application process? P: I don’t think so.
    - How would you go about uploading a file if you're on a mobile device? P: I would have to [read guidelines on format] I would have to check out my mobile device [would call someone else for help, her daughter]
    - What are your thoughts regarding the allowed file type for PDFs?
* **Step 6 of 6: Review application**
* M: what would you do at this point?
* P: I’d click on each one [accordions] and work my way down to make sure I’ve done everything I needed to do, to make sure I didn’t miss anything. It makes the process longer but it makes it easier for me.
* M: what would you do at this point?
* P: I said I was going to send it by mail, but if I wasn’t sending it by mail, I would submit the application, but I noticed in one of the boxes, it said if you’re mailing your proof, your files, you’d want to mail your application with it is what I thought it said.
* **Confirmation**
  + What would you do at this point?
  + P: I’d print this page. Check and make sure, mail or fax additional files. Ok. Then I would check to find out what happens after you apply.
  + M: what would you at this point after you checked out the page?
  + P: like I said, I would find out what happens after you apply.
  + M: what would you do at this point, after you looked through the page?
  + P: I’d find out what happens after I apply, but if there’s anything that needs to be printed out, I would make a file that says application for burial and then keep everything together, the information that I get back from them.
  + When do you think you would get a decision? P: my philosophy on the VA I have learned is hurry and wait, so probably a couple of months.
  + Is there anything that would be helpful to see at this point once you've submitted? P: yeah, expect an answer in…so much time. 6 months. 4 months. Something like that would relieve the pressure on someone applying.
  + *Have them click After You Apply link*
* **After you apply**
  + *Optional: Have them briefly look at page to get their thoughts*

[Go to Post-Task Interview](https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/products/burials-memorials/pre-need/research/integration-research-aug23/pre-need-integration-testing-conversation-guide-aug23.MD#post-task-interview---5-10-minutes)

**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? I thought it was really good. It was easy, pretty self-explanatory. There were still a few things I’d have him check out, like his service dates. Overall, I thought it was a pretty easy process.
* 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? I would rate it probably a 4 just because I said it’d be nice to see how long it would take them to get around to this. Overall, how it sists as it is, I would give it a 5. It was easy to understand. It was self-explanatory. Maybe, for some of those areas, if you’ve never dealt with a service office, if you don’t know this information, a service officer might be able to help you
* On a scale of 1 to 5, how mobile-friendly do you think it is? P: mobile friendly? A 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? P: actually, I thought it was really good. Like I said, I might throw on there some information, like contact a service officer.
  + How would you do things differently?
* Is there anything else on your mind that we didn't ask? P: not that I can think of.
* 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?
* [ginger chimed in] P: when you’re fililng this out, if you’re dealing with a death, you’re already dealing with some hard issues, and if they’re not dead, it’s just like taking your will out. It’s kind of scary. I’m thinking I don’t want him to die for a long time, and this paper, it’s making it, yes, he’s going to die. It is kind of scary to do stuff like that. But I’m kinda glad I did this with you guys because I may get my fanny in gear, and [name] and I may get together and fill this out because it’s inevitable.

**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.**
* **UXers: Note participant quantitative results after observers have left.**

**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.]