**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]
  + P: I have none. I’m married to a Navy Vet.
* 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?
  + P: Yes.
  + M: How did you find this out?
  + P: Presentation from my attorney, my state-planning attorney
* What do you think qualifies you to be buried in a national cemetery?
  + P: married to a Navy Vet
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery?
  + P: Yes
* Have you applied before to see if you're eligible for burial in a national cemetery?
  + 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?

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

P: Just an aside, I’m already set up at Great Lakes National Cemetery.

* **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:*

*P: so when I see the button to apply for pre-need eligibility, that’s where I go to fill out the form, correct? [read through page carefully and was able to easily locate apply button]*

*M: [confirmed they could click]*

* **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**

* **Introduction**
* P: so I gather my ssn […] and I should be good to go?
* M: you can go ahead with what you would naturally do
* P: so you want me to go ahead and start the pre-need application?
* M: if that’s what you would do normally [P started the application]
  + 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**
  + *Things to watch for:*
    - Observe if user has difficulty answering applying for self or someone else field (should select Applying for Self). P: [No difficulty]
    - Does the user feel the need to open the additional info component? P: [No]
  + If they have difficulty, could ask: What are you leaning towards selecting here? Why?
* **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). P: they seem to be good. They seem to be comprehensive, yeah. [selected 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)\_
  + **Applicant details**
    - P: I’m used to using a laptop without a big mouse.
    - *Things to watch for:*
      * Do they understand they would need to provide their details here (Robin Smith)? Unknown
      * Does the user show any confusion with two new birth fields?
  + **Applicant's mailing address**
    - M: does it make sense to have the address details here?
    - P: yeah, seems logical to me. [mentioned she sometimes has difficulty with the formatting for phone numbers when she types them in]
    - *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**
  + **Sponsor details**
  + **P: I like that you save the application on every change because sometimes you’ll get interrupted or you have slippery fingers.**
  + **P: you want me to make up a [name]? I can’t remember the name you gave me.**
    - What are your thoughts regarding whose details you'll need to provide here? P: no problems. If I’m a spouse and I’m married, I certainly know the details, so it’s all good. And it’s all certainly in the form. I have to know all these details about birth date and where. The city/san diego/California, all that. That’s all logical. Makes sense.
  + **Sponsor's mailing addresss/contact details**
  + P: So if it’s a spouse, why doesn’t it autopopulate with the same address? Because I’m a spouse, I guess.
    - *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? P: I guess I’m not aware as a divorced person I could be buried in a national cemetery based on previous spouse’s military service. So when you have separated, I can get, but if it’s divorced, I guess I would have to read the fine print on the eligibility to figure that one out.
    - P: [wondered if the rest of the questions were prefilled as prefer not to answer]
    - Is there anything you would change? P: no, they’re pretty basic nowadays when you fill out these forms. They want to know your ethnicity and your cultural…
    - M: and the text at the top?
    - P: Yup, for statistical purposes
    - *Things to watch for:*
      * How do users react to answering potentially sensitive questions?
      * How do they approach Other Category Comment field?
  + **Sponsor's passing**
  + P: did you say he passed or you say I don’t know?
  + M: go ahead and select yes in this case
  + M: did you have any ill feelings about their passing?
  + P: no, I wouldn’t say this resurfaces grief feelings… it’s just standard stuff.
    - *Things to watch for:*
      * How do users react to answering potentially sensitive questions?
* **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? P: if I had their dd214 yeah, that’s not a problem. The claim number, I don’t know. That, I don’t know yet because that’s not been issued on this form, correct? If known
  + **Sponsor's service periods**
    - Would you feel prepared to answer these questions about your sponsor or would you need to look them up? P: it’s in the dd214. That’s not a problem. Although I don’t see… not all comprehensive right now in order for me. So we’re just picking something to pick something, right? And I got this off the dd214, too (service dates).
    - 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? On the dd214 (discharge character of service)
    - *Things to watch for:*
      * Would they be able to add multiple service periods for their sponsor?
    - P: when you say another service period, what are you talking about, reserve? It needs clarification. The one above needs to clarify whether you’re talking active duty or whether you’re talking reserve status.
  + **Sponsor's previous name** -*Have them select YES*
    - P:
    - *Things to watch for:*
      * Do they understand what this field is asking?
* **Step 5 of 7: Burial benefits**
  + **Previous Decedents**
    - Would you understand what this question is asking about your sponsor? P: yeah. Has he sponsored anybody else to be buried in a VA national cemetery? So I guess a previous wife or a dependent child or…
    - M: I’m going to have you select yes.
    - *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? P: yup, great lakes in Michigan.
    - M: how would you go about finding that location?
    - P: maybe I can type it in because it doesn’t look like it’s in that dropdown menu.
    - M: you can go and select that [Lexington]
    - 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? P: yeah because you need proof that I’m eligible.
    - What do you think you could provide to help your application process? I can upload the dd214 and I can upload a copy of my marriage certificate.
    - How would you go about uploading a file if you're on a mobile device? P: on a mobile device? I can take a picture and put it in. I could go to my onedrive and pull off a scanned document and attach it.
    - What are your thoughts regarding the allowed file type for PDFs? P: I don’t have a problem with it. It’s mostly what stuff is being saved as nowadays, so that’s ok. I don’t know as a novice and a kindergarten person what that means, what the options are when it automatically saves. Google […] most of the time I agree with the default settings.
* **Step 7 of 7: Review application**
  + P: so I can expand any one of these so I can make sure I agree with what I put in and all that good stuff?
  + What would you do at this point? P: I’m comfortable with my answers so I am not needing to look at them. I can read the privacy thing and accept here. Or like you do most of the time, you can kind of blow by that and say that you agree with of of the terms. So I can submit the application? Yes?
  + M: yes
* **Confirmation**
  + P: you’ve submitted your application
  + What would you do at this point? P: I’d print this page since it has the confirmation number on it.
  + When do you think you would get a decision? P:Like in 4-6 weeks.
  + Is there anything that would be helpful to see at this point once you've submitted? P: I don’t remember for contact me. Did I put the email address anywhere at the top? Just so that the eligibility people could get back to me if they have questions. I think I put an email address and some contact stuff on there.
  + *Have them click After You Apply link*
  + P:
* **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? P: pretty easy. Pretty straightforward. Self-explanatory.
* 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? P: 5
* On a scale of 1 to 5, how mobile-friendly do you think it is? P: 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: I don’t know that I’d make any changes. It’s really good. I mean, a couple of rough points for what I said about dates and then about the service, post-active duty, reserve startus, but it’s all good.
  + How would you do things differently?
* Is there anything else on your mind that we didn't ask? P: 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]
* C: was the terminology in the application process clear to you between applicant and sponsor? P: yes, it was clear to me.
* 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.**
* **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.]