**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] My mom is a Veteran. I’m her caregiver. [uses va.gov to frequently manage her mother’s care, etc.]
* 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? When my mom had a stroke, they were giving me all her information, so I did know that.
* M: how did you find out about it? P: when she had her stroke, that’s when I became her full time caregiver. That’s when they gave me her full information. I do know that the information is out there.
* What do you think qualifies you to be buried in a national cemetery? P: you have to be, of course, a veteran or in service, and I guess if you had an honorable discharge or whatever…
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery? [yes, she would as the daughter of the Veteran. Note that this should have been asked in the perspective of her mom as she is applying on behalf of the Veteran]
* 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 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:** for me, it’s a lot, especially if you’re doing this on your phone. This is a lot for me to even go down to try to get the information. Because first, find out if you’re eligible. One of these must apply to you. ok. Gather the supporting documents… we go through all that. What information do I need to apply? It’s like, we’ve already gone through that at the top. It can get overwhelming. It’s already a sensitive subject, burying your loved one.
* **M:** now if you wouldn’t mind and clicking the apply, and we’ll move to the next screen.

*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**
  + M: from this point on, you can go ahead and walk through the application.
  + P: I would start the preneed eligibility application.
  + M: in this case, if you wouldn’t mind reading the rest of the information just to gather your perspective.
  + P: ok [started reading page].
  + What are your thoughts regarding the content on this page?
  + Do you feel prepared to start applying? P: it’s not as wordy as the first page. I like how you have I can start up here at the top and also after reading down everything, you also have it right here so I don’t have to scroll all the way back up. I can start right here to apply. I also like how you have if you need assistance right here, and then you also have it down here [need help] so that’s pretty good as well. Finally, you let me know after I get finished what’s going to happen, so I can take the guess work out. It’ll let me know it’ll go into decision review.
    - *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: so I’ll be applying for 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?
  + **Preparer details**
    - P: Sammy smith. So that’s prefilled. That’s good.
    - 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)?
  + **Preparer's mailing address/contact details**
    - P: perfect.
    - *Things to watch for:*
      * Do they understand they would need to provide their details here as the preparer? P: that’s perfectly fine. I feel it’s needed because I’m the one doing the application on behalf of robin, so it’s helpful that they would have my information. So I think that’s good. So if I don’t really want to give people my information, it tells me right here [additional info] why they need my information. I also like how if I need to finish my application later, I can click right here and it’ll save my progress.
* **Step 2 of 6: Applicant information**
  + **Applicant relationship to service member / Veteran**
    - What do you think this question is asking? P: so this would be other, right? Or is it something else? So it’s asking what is sammy’s relationship to the veteran. Is that correct? [she was confused by field label and thought she would be the applicant]
    - 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**
    - *Things to watch for:*
      * Do they understand they would need to provide the applican't details here (Robin Smith)? P: [understood who the applicant was]
      * Does the user show any confusion with two new birth fields? [No]
  + **Applicant's mailing address**
    - *Things to watch for:*
      * How do users react with applicant address/contact page being moved to this new location?
  + **Applicant demographics**
    - Do you have any thoughts regarding the questions and options available here? P:
    - Is there anything you would change? P: this question right here [sex] I’ve seen in other applications where they have varying degrees of other categories. I’m not sure if that’s something you all would want to look into, but that would be the only call out right here.
    - M: how do you feel about the content of the two questions [2nd demographics page]
    - P: no, this is fine.
    - *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**
    - Are you familiar with the military status dropdown options? P: yes.
    - M: you understand this would be for the applicant that you’re filling out? P: yes, and not the preparer.
    - Would you know what to provide for these fields? If not, how would you get that information? P: this information right here would come off of that form, the dd214. So all of that information would come off of that.
  + **Service periods**
    - P: the same with this.
    - Would you feel prepared to answer these questions or would you need to look them up? P: if I didn’t know, I would just get that dd214 form and just pull all the information from that.
    - M: are you familiar with these options?
    - P: yes
    - 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?
  + **Previous name** -*Have them select YES*
    - M: you understand what we’re asking for here?
    - P: this is the applicant, right? So the applicant’s previous name was Sammy? [prototype error]
    - *Things to watch for:*
      * Do they understand what this field is asking?
* **Step 4 of 6: Burial benefits**
  + **Previous Decedents**
    - P: it’s straightforward. So this is basically asking, you remember in the beginning where I was choosing the eligibility, and it had a child. So I’m assuming this person taylor smith is connected to the applicant.
    - 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**
    - P: I like how you’re telling us up front that there’s no guarantee here, and I like how you tell us that you’ll work with our family if there’s no space available. So I do like that. That’s a great placement.
    - Do you have something in mind for where you'd like to be buried? Yes, right here, 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 5 of 6: Supporting files**
  + **Upload supporting files**
    - P: [opened the accordion that corresponded to her scenario first.] do you want me to click upload file?
    - M: yes [P clicked button]
    - P: I guess this would be… ddd is the discharge form.
    - Do you think you would need to upload something here to continue? P: yes.
    - M: you can select the discharge option here.
    - What do you think you could provide to help your application process? P: [nothing else]
    - How would you go about uploading a file if you're on a mobile device? P: It would have to be saved or… I don’t know if you can. It tells you right there how you can upload them. If I needed to upload another one, I would just click here [upload another button]
    - What are your thoughts regarding the allowed file type for PDFs? P: [wouldn’t be an issue for her]
* **Step 6 of 6: Review application**
* **P: I like how I can edit if I need to [opened accordions to look through] I can go back.**
* **M: you like to double check what you previously inputted?**
* **P: yes, I do. Sometimes, especially, if you’re moving fast, you can miss something.**
* **Confirmation**
  + What would you do at this point? P: at this point, knowing myself, I’d probably click this right here to see what happens after you apply there’s that self-assurance of the information being right there again, so I’d definitely click on that, and probably just browse the page.
  + M: you can go ahead and click on that if you don’t mind
  + P: [clicked what happens after link, but had pop up blocker]
  + 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? P: no, I think it’s important information.
  + M: When do you think,b ased on what you read, when you would get a decision?
  + P: probably 3 weeks. I would estimate probably three weeks.
  + *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? P: it wasn’t bad. It was easy to follow through. The only thing was that first page was very very wordy, but once you got into the application, everything was 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: 4
* If you could snap your fingers and recreate the application process for pre-need to make it better, what would that process look like?
  + How would you do things differently? P: the only thing is it’s very wordy in the beginning, so I would try to chop that down slightly. Other than that, the application process was pretty user friendly. I like how the stuff was prefilled, like if someone has an account, the information is already pulled over. I like being able to review the information before submitting. Some applications say you only have 15 minutes to finish or all your info is lost. So I like how it’s not timed and that you can save your information and go back.
* 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]
* 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.]