**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 was in the air force for 24 years both enlisted and commissioned. I was an EMT enlisted contracting officer when I commissioned. And I retired in 2010.
* 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: No
* What do you think qualifies you to be buried in a national cemetery? P: I was on honor guard as an enlisted member but we did the burials. I know as long as you had a dd214, you could get buried there.
* 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? P: 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? P: yes

**Task 4: Applying for Someone Else - Applicant is a non-Veteran - 20 minutes [not the applicant’s sponsor]**

* **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. 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.
* **P:** so I get the play mode?
* **M:** you’re able to scroll using the mouse on your screen.
* **P:** ok, got it. Find out if you’re eligible. One of these must describe you. didn’t receive a dishonorable…. Choose the va national cemetery where you’d like to be buried [tried clicking find cemetery link, tried clicking find state cemetery link] [read most of the page]
* **M:** what are your thoughts about the content of this page?
* **P:** they are very direct. I like that there are steps, that it’s broken down. Finding a national cemetery was good, a state cemetery. And then gather the documents. I like the flow of it. I like that you can get the gist of the information of what you need to be eligible up front. That doesn’t mean youre going to be approved, but it gives you the majority of information you’ll need to be eligible.

*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**

* **Introduction**
* **P: applying for someone else. I’m applying for someone else. Ok, so I have to read what to know if you’re applying for someone else. Ok, they have to be disabled, so I can continue.**
  + 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 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 the preparer. So I have to fill that in.**
* **M: whose name would you put here?**
* **P: the veterans. So not the person being buried, not the dependent. It says, your 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)?
  + **Preparer's mailing address/contact details**
  + **P: so if I’m signed in to va.gov, it’ll prefill the details here?**
  + **M: and you would understand what yo’d need to fill in here? P: yes**
    - *Things to watch for:*
      * Do they understand they would need to provide their details here as the preparer?
* **Step 2 of 7: Applicant information**
  + **Applicant relationship to service member / Veteran**
  + **P: now it asks about the person. So here I would put that it’s my adult dependent son who is disabled. And I would continue.**
    - What do you think this question is asking?
    - M: do you understand the terminology?
    - P: yes. Adult dependent son.
    - 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)\_
  + **Applicant details**
  + **P: ok, so applicant details. Ok, so to me, the applicant, I get what they want, but for me to put this in, I’m the veteran. I would think I’m the applicant, I’d want to fill it out. So to me, I’m the applicant, as opposed to the dependent child.**
  + **P: [clicked the field]. Robin smith. I’m going to presume Robin is the son. I see maiden name, so is Robin the son? So there’s no maiden name, so I would put in the social, robin’s date of birth, then I would hit continue.** 
    - *Things to watch for:*
      * Do they understand they would need to provide their child's details here (Robin Smith)?
      * Does the user show any confusion with two new birth fields?
  + **Applicant's mailing address**
  + **P: applicant mailing address.**
  + **M: having the mailing address consistent with the applicant details is correct?**
  + **P: yes [would assume they’re living with her]**
  + **P: applicant’s contact details. ok**
    - *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**
  + **M: in this case, I’m going to hae you select no. we want to find the circumstance where the applicant is not the sponsor.**
  + **P: ok.**
    - *Should select YES, that they're the sponsor here.*
    - Do they have any confusion with the sponsor terminology?
  + **Sponsor details**
  + **P: Hmm. Ok, so Riley was not my name. that’s not the veteran’s name, correct? Was the name Riley at the beginning of the scenario?** 
    - What are your thoughts regarding whose details you'll need to provide here?
  + **Sponsor's mailing addresss/contact details**
  + **M: ok, so jumping between the preparer, applicant, and sponsor, do you think that’s confusing? How would you improve that?**
  + **P: [1:20pm]… if you can put something to say, relationship to person, mother or something. I would put my name as the sponsor, as the applicant.** 
    - *Things to watch for:*
      * How do users react with sponsor address/contact page being moved to this new location?
  + **Sponsor demographics**
  + **P: what’s the sponsor’s marital status?** 
    - Do you have any thoughts regarding the questions and options available here? P: it’s straightforward, but the sponsor would be the Veteran. That’s very definitive, but I don’t know what you want me to pick. That is very clear. The sponsor identifier.
    - P: we require some basic details… why? I prefer not to answer. What difference does it make for the ethnicity for the person being buried, or the sponsor?
    - M: do you have any issues with the questions here?
    - P: no
    - 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?
  + **Sponsor's passing**
    - *Things to watch for:*
      * How do users react to answering potentially sensitive questions? P: I think the more appropriate way is is the sponsor deceased. If you’re going to ask this question, it needs to be before what is the status of the person filling it out, the sponsor. If the person is deceased, it would make sense then.
* **Step 4 of 7: Sponsor military history**
  + **Sponsor's military details**
    - Are you familiar with the military status dropdown options? P: yes
    - Would you know what to provide for these fields? If not, how would you get that information? P: since the veteran is deceased, that person should have everything you need from the start. They should have their dd214.
    - M: do you understand the sponsor’s va claim number?
    - P: yes. It’s on any type of document that the VA sends out, like that letter of benefits
  + **Sponsor's service periods**
  + **P: sponsor’s branch of service**
  + **M: do you understand that question?**
  + **P: yes**
  + **P: I have no idea of the highest rank or any of those things**
  + M: go ahead and select that first option
    - Would you feel prepared to answer these questions about your sponsor or would you need to look them up? P: I would not feel prepared to answer these questions.
    - What would you do if you didn't have this information on hand? P: I would log out because I would be frustrated. For a military person and going to another branch to figure things out, I would log out and not do it. […] if you go from active duty to reserve, then go back to active duty. What date do you want in there? As well as if there was a break in service. Like if you got out, then were commissioned. So character of service. Ok, that answers my question [add another button]. Do you have to put every single service period? Because you have a different dd214 for each of those. Do you want me to add another service period? [clicked button]
    - M: what are your thoughts on this page?
    - P: it answered the question before about if there was a break in service. If you had honorable in the navy in 2005 and then you went back in when you got dishonorable. Would you put that? Would you qualify if it was honorable and then dishonorable?
    - M: I’m going to have you go to the bottom and click remove. You can select continue.
    - 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 for their sponsor?
  + **Sponsor's previous name** -*Have them select YES*
    - M: for this one, I’m going to also have you select yes. You understand the sponsor terminology here?
    - P: right. If it was the husband who was a sponsor, you’d have their previous name here. Well, there have been husbands who take another name. Ok, sponsor’s previous name.
    - *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: yes.
    - P: I like that it has the person’s name. [1:35]
    - *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: ok, so I’d hit the tab to see where they’d want to be buried. You gave the option before you started the application official process. There was that information.
    - 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**
  + **P: and they should have these files because, again, before they start the official process, you tell them to have these available.** 
    - Do you think you would need to upload something here to continue? P: I would feel the need to have to upload them if it was a dependent adult child. As a veteran, everything is already there, the dd214. You’re able to have it in the system, but for dependent child, adult child, from the time the person got out of the military, something might have happened. But you should only have to upload that medical documentation to show that that child is disabled. [clicked on applying for someone else accordion for her scenario]. So when it says if you’re applying on behalf of someone else, I’m applying on behalf of somebody else. I already have a dd214, but I’m applying on behalf of someone else, but they don’t have a dd214 separation paper. [hadn’t read child copy] ok, so if you’re applying for an unmarried adult child of a veteran, you can upload… ok, so yes. That’s the only thing I’d think you had to do. Should I upload or continue?
    - What do you think you could provide to help your application process? P: no, because if I’m the sponsor, it’s there. If I’m talking about this specific scenario, it’s there. If the child is disabled [1:39]
    - How would you go about uploading a file if you're on a mobile device? P: I have no clue. Oh, I could take a picture of it and then attach it that way.
    - What are your thoughts regarding the allowed file type for PDFs? P: yes [it would be an issue to upload pdf]
* **Step 7 of 7: Review application**
  + What would you do at this point? P: [looked through the accordions to make sure everything coincided with what she answered] just to make sure I didn’t fat finger anything.
  + P: as we started before, I was like, who is Robin, but I wanted to go back and say, Sammy is me the Veteran. Robin is the child. So there was a name change that we had to go through for the veteran, so I didn’t understand why we did that, and it was so why would there be a name change. Sponsor’s previous name, Robin. So it should be Sammy.
* **Confirmation**
  + What would you do at this point? P: I would print this page. Click that button and print that page.
  + When do you think you would get a decision? P: [30 days]. Ok, so the applicant’s name. so who is robin?
  + M: that would be the applicant.
  + P: so who is Sammy?
  + M: that would be the sponsor
  + P: so how would they get emails if they’re disabled? [thought that they’d have issues receiving emails, phone calls about the application]
  + Is there anything that would be helpful to see at this point once you've submitted?
  + *Have them click After You Apply link*
  + *M: would you have selected this link?*
  + *P: after I finished scrolling… I don’t think I would have scrolled down, after I printed this. I wouldn’t have scrolled down to see because I would have thought that I’ve got everything. [unblocked pop up blocker to open link]*
* **After you apply**
  + M: would this have been helpful?
  + P: no, this would have frustrated me.
  + *Optional: 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? P: in the beginning, to get the information of what I was doing and the information and documents that I needed before I started the process were excellent.
* 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: 3
* On a scale of 1 to 5, how mobile-friendly do you think it is? P: 1. I don’t bank on my phone. I don’t have apps on my phone. You want me to take a picture and upload it when [it’s a very valuable document and doens’ tknow how to work with pdfs] I don’t think it’s very friendly. [thought it would be good to have for families what you can expect instead of at the end]
* 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: the terminology for are they still alived versus deceased. The terminology of differing between sponsor, applicant, and burial person, and to go through it, I think for this last page, what happens next. You can’t control process, but there should be a month and year of when this page was updated. This should kind of be before you take the time to go through this instead of seeing excuses at the end. As veterans, we hear a lot of excuses. So it’s like, whelp, we have a lot of work to do. It’s kind of like you’re putting the fault on the veteran for dying. So it’s like putting an excuse at the end, we don’t even know if we’re going to give this to you, it’s kind of insulting.
  + 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? P: so if this is going to be something that I can apply online, and that you can accept it, will it be something that I can see the updates on va.gov?
* M: eventually, yes
* P: so as I go through the application… [felt very strongly that the claims status tool was useless for tracking submitted applications]

**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.]

va.gov-team/products/burials-memorials/pre-need/research/integration-research-aug23/pre-need-integration-testing-conversation-guide-