**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] Id id 20 years total, 14 years active, 6 reserve […]
* 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? Yes. Actually I’ve had some presentations by the assistant secretary for va of mortuary affairs several years ago… we had several va people come in. I think a very nice gentleman came in in 2018 to talk about burial benefits.
* What do you think qualifies you to be buried in a national cemetery? P: I did active duty with an honorable discharge.
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery? P: no.
* 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: Possibly

**Task 4a: Applying for Someone Else (as the sponsor) - Applicant is a non-Veteran - 20 minutes**

* **Scenario:** For your scenario, pretend that you are Sammy Smith. You're a Veteran, and you have a disabled adult dependent son who is 20 years old. You want to help your son to see if he is eligible for burial in a VA national cemetery with you sponsoring their benefits. How would you go about filling out this application for your son? 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:** get more details about eligibility. [wanted to click on the links he’d seen so far]. Click on appy for pre-need eligibility [action link]
* **M:** how do you feel about the content on this page?
* **P:** it’s good, especially the part that talks about the disabled child
* **M:** do you feel prepared to start applying?
* **P:** yeah, the only thing I would recommend a link for FAQs, additional information. I’d want to click on that [felt ready to 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're a Veteran, and you have a disabled adult dependent son who is 20 years old. You want to help your son to see if he is eligible for burial in a VA national cemetery with you sponsoring their benefits. How would you go about filling out this application for your son?

**Questions to ask as they go through scenario**

* **Introduction**
* **P wanted to start applying right away**
* **M: [prompted him to read the rest of the page]**
* **P: [read through prepare step. Ok, question. It says get help filing your claim. So that link will go to a Veterans service officer or someone like that?**
* **M: that’d be helpful to you?**
* **P: yeah, so someone like a vso or someone like that**
* **P: [read to the bottom] ok, it looks good [the content]**
  + What are your thoughts regarding the content on this page? [would like a link to a vso or a dav – clicking this link will take you to a local resource, something like that]
  + 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:*
    - P: ok, click on I’m applying for someone else
    - 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**
    - Whose name do you think would need to be noted here? P: the veteran’s first name
    - *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: ok, go down. It would be street address, city, go down. Yeah, just fill all that in. phone number. Email address.** 
    - *Things to watch for:*
      * Do they understand they would need to provide their details here as the preparer? [yes]
* **Step 2 of 7: Applicant information**
  + **Applicant relationship to service member / Veteran**
    - P: adult dependent son
    - M: do you have any questions regarding the question here?
    - P: no, it seems fine to me. I guess some people might click on what if the applicant is not a service member or veteran? But it’s my understanding the son is not the service member or veteran.
    - What do you think this question is asking?
    - What are your thoughts regarding the available options? (should select Adult Dependent Son) P: perhaps under other you could put a couple of examples of other. Like a dependent aunt or you could even put a disclaimer that says, you know, a dependent mother or father of the veteran is not qualified. Under other, you could put a couple of examples, I think. That might help a little.
    - *Things to watch for:*
      * Does the user feel the need to open the additional info component?
  + **Applicant details**
    - I assume this is the name of the dependent son, then. So we would fill in that information.
    - *Things to watch for:*
      * Do they understand they would need to provide their child's details here (Robin Smith)?
  + **Applicant's mailing address**
    - Ok, fill in that information.
    - *Things to watch for:*
      * How do users react with applicant address/contact page being moved to this new location? P: that’s fine. You might also put possibly you could prefill the applicant, the person getting the benfits, prefill it from the veteran if it applies. You could put a radio button in there that says, does your recipient live at your address? And it could also say, no they live at another address or something like that.
* **Step 3 of 7: Sponsor information**
  + **Applicant's sponsor**
    - P: ok, do the pull down menu, what is a sponsor.
    - M: do you have any questions here?
    - P: I guess that’s ok, so yeah, you are the applicant’s sponsor.
    - M: you understand what we’re asking here?
    - P: yeah, you’re asking if the applicant is connected to the veteran. The only thing you could put here is dependent son/daughter. Maybe it’s a little too much, but it might help.
    - *Should select YES, that they're the sponsor here.*
    - Do they have any confusion with the sponsor terminology?
  + **Sponsor details**
    - [P read the blue prefill alert]
    - P: ok, so we need to fill in that social security number, and the date of birth, and the sponsor’s birth city, and the state.
    - What are your thoughts regarding whose details you'll need to provide here? [Should be their details as Sammy Smith] P: I wouldn’t have any problem with it. The va has pretty much everything, so when I deal with the va, I don’t have a problem providing all this information so it wouldn’t bother me, so continue.
    - *Things to watch for:*
      * Does the user experience any confusion in reading details?
      * Does the user show any confusion with two new birth fields?
  + **Sponsor's mailing addresss/contact details**
    - Ok, continue. [took a look at the fields]
    - *Things to watch for:*
      * How do users react with sponsor address/contact page being moved to this new location?
  + **Sponsor demographics**
    - P: so you’d click on the appropriate thing for the sponsor.
    - Do you have any thoughts regarding the questions and options available here? P: it gives you a prefer not to answer option. That’s a good way to do it.
    - P: [dem2] again, you’re giving them the prefer not to answer options. So I think that’s a good way to do it.
    - Is there anything you would change? P: no, go down to that box there.
    - *Things to watch for:*
      * How do users react to answering potentially sensitive questions?
      * How do they approach Other Category Comment field? P: you could where it says other category comment. You could put an asterisk by other and say, please, what is the specific category that you had in mind or something like that or where it’s explained further for other. You could also put for that, if you check other, is is mandatory that you put an exclamation in that box? So something like that.
  + **Sponsor's passing**
    - *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? P: the other is a little confusing. I’d want to have some more information on that because what is other? What did you have in mind. That pretty much covers it, so you’d want to explain what other is.
    - Would you know what to provide for these fields? If not, how would you get that information? P: Sponsor’s military service number, they might have to look that up. Most people it’s their ssn, but for other vterans, it might be a different number. Sponsor’s va claim number. You might want to put some information on what that is. That sponsor’s va claim number, you need to put some information or that it’s optional. That could be confusing, the va claim number, for a lot of people I think. Same deal with the military service number. Could be ssn or any other number, so that could be confusing to some people.
  + **Sponsor's service periods**
    - You might want to put an asterisk there, like rank not paygrade. For sponsor’s branch of service, you could do a pull down menu. Nowadays [there could be a lot of options]. That could be confusing. Highest rank, you could do a pull down menu because that could be confusing here. This is pretty explanatory for the navy. [thought the list needed more options] [was confused on how the branch and rank options would work as he thought the options shown were the only ones] I would say paygrade would be your best bet. Or you could have paygrade and rank.
    - Would you feel prepared to answer these questions about you as the sponsor or would you need to look them up? I’d have to go look this up, have to go to my dd214. Hopefully I’d have my service records with me. Maybe at the bottom y ou could put a note saying if you need assistance with this information, contact VA. Most of this is going to be on your dd214 or your service papers. If you can’t, you might want to call your va service provider and that might help.
    - 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: you might want to put a note, if you have any questions about this, especially other, reach out to your va service representative. For some people, this might be confusing.
    - *Things to watch for:*
      * Would they be able to add multiple service periods for their sponsor?
  + **Sponsor's previous name** -*Have them select YES*
    - I’d check yes, and if no, you might want to put a little note there. If you check no, please contact a va service represensative because if you served under another name… […]
    - [understood it’s for if it’s a married woman or if someone changed their name] you might want to put a note in. if this applies to you, here’s additional information.
    - *Things to watch for:*
      * Do they understand what this field is asking?
* **Step 5 of 7: Burial benefits**
  + **Previous Decedents**
    - P: That’s self explanatory [question about decedents]
    - P: that’s self-explanatory, I guess [name of deceased persons]
    - Would you understand what this question is asking about the sponsor?
    - *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**
    - I’d put a pull down menu menu there. [10:16]
    - Do you have something in mind for where the applicant would 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?
* **Step 6 of 7: Supporting files**
  + **Upload supporting files**
    - [10:18] P: I guess the upload the files. I guess it’s self-explanatory. You might want to include a little guide for how to upload a file. I would put in red right up front what you have to upload, right in red.
    - Do you think you would need to upload something here to continue? P: I don’t know [10:19]
    - 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?
* **Step 7 of 7: Review application**
  + P: I assume each one of those, when you click it, you’ll get all the information that was supplied?
  + M: would you want to select these?
  + P: do applicant information. Well, that looks pretty good the way it is, so they can click each one of those and review the information.
  + What would you do at this point? P: I’d submit application.
* **Confirmation**
  + What would you do at this point? P: I like need help. I like that.
  + 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: maybe at the bottom, I would just say, if you have any further.. well, you’ve pretty much got it. Call that 1800. So that pretty much has what they need.
  + *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: I think it’s pretty good, just needs some clarification in some places, and like I said, just put in there that a lot of people, especially finding their records, especially uploading files. Just be generous with helping them get help [?]
* 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: 4
* On a scale of 1 to 5, how mobile-friendly do you think it is?
* 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: it looks pretty good to me. It’s pretty much self-explanatory. You have some people no matter what you do, they’re going to need to talk to somebody. So always have the option to talk to somebody. I think this is great.
  + 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]
* 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.]