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

**P3**

**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]
  + Army infantry, joined at 36, went through basic training and was discharged at 100% spine injury and chronic nerve pain.
* 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 did not, its not a topic that we want to discuss but occasionally touch on
* What do you think qualifies you to be buried in a national cemetery?
  + 20 years service, retired.
* When thinking about planning for your burial, would you prefer to be buried in a national cemetery?
  + Neither one of us have anything in mind which this came along at the perfect time
* 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?
    - Yeah in the near future

**Task 4b: Applying for Someone Else (not as the sponsor) - Applicant is a non-Veteran - 20 minutes**

* **Scenario:** For your scenario, pretend that you are Sammy Smith. You're the parent of a disabled adult dependent son who is 20 years old. You want to help your son apply to see if he's eligible for burial in a VA national cemetery with your Veteran spouse 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.

*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 married to a Veteran. You're the parent of a disabled adult dependent son who is 20 years old. You want to help your son apply to see if he's eligible for burial in a VA national cemetery with your Veteran spouse sponsoring their benefits. How would you go about filling out this application for your son?

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

* **Introduction**
  + What are your thoughts regarding the content on this page?
  + Do you feel prepared to start applying? Yes, Id also call my wife in
    - *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**
    - 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**
    - *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**
    - What do you think this question is asking?
    - What are your thoughts regarding the available options? (should select Adult Dependent Son) I would click link
    - *Things to watch for:*
      * Does the user feel the need to open the additional info component? Yes
  + **Applicant details**
    - *Things to watch for:*
      * Do they understand they would need to provide their child's details here (Robin Smith)? It was “I’m guessing” that was the information for my veteran’s spouse? The applicant is the veterans spouse because the VA would have information on the veterans spouse and not the child so that’s veteran’s spouses information.
  + **Applicant's mailing address**
    - *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**
    - *Should select NO, that they're not the sponsor here.*
    - Do they have any confusion with the sponsor terminology?
      * “Now its more clear to me which one is which so I would go back and fill in my son’s information.”
  + **Sponsor details**
    - What are your thoughts regarding whose details you'll need to provide here? [Should be entering their Veteran spouse's detais]
      * It is clear now that this would be the veteran, my wife.
    - *Things to watch for:*
      * Does the user experience any confusion in entering sponsor details?
      * Does the user show any confusion with two new birth fields?
      * No , I know my wifes information its all simple stuff
  + **Sponsor's mailing address/contact details**
    - *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? Pretty straightforward
    - Is there anything you would change?
    - *Things to watch for:*
      * How do users react to answering potentially sensitive questions? Wanted to click prefer not to answer
      * How do they approach Other Category Comment field?
        + I would check other if it was some sort of national or racial identity
  + **Sponsor's passing**
    - *Things to watch for:*
      * How do users react to answering potentially sensitive questions?
        + Confused again with the terms thought sponsor was the applicant.
* **Step 4 of 7: Sponsor military history**
  + **Sponsor's military details**
    - Are you familiar with the military status dropdown options?
      * Service number I know older vets had actual service numbers and my generation uses social security numbers. The VA claim number if known , I don’t know my VA claim number. I would not try to fill that in and if I did come up with that information later I would come back and fill that in because I know every bit of information helps speeds things along.
    - Would you know what to provide for these fields? If not, how would you get that information?
  + **Sponsor's service periods**
    - Would you feel prepared to answer these questions about your sponsor or would you need to look them up? I would be aware of that date
    - What would you do if you didn't have this information on hand? DD214 which is sacred document, or ask my wife.
    - For the discharge character of service options, are you familiar with those? I have seen all except uncharacterized
    - *Things to watch for:*
      * Would they be able to add multiple service periods for their Veteran sponsor?
  + **Sponsor's previous name** -*Have them select YES*
    - *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 the Veteran sponsor?
    - *Have them select YES*
      * *We would have someone already interred using my wifes benefits.*
    - 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?
        + The applicant is the disabled son, so looking to see where we would be burying our son when he passed.
  + **Desired cemetery**
    - Do you have something in mind for where the applicant would like to be buried? Yes
    - 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?
    - What do you think you could provide to help your application process? I have all my documents uploaded to the computer so I would upload the files.
    - How would you go about uploading a file if you're on a mobile device? I would have to go to my google drive to put it on my mobile device and select the file from here and upload it.
    - What are your thoughts regarding the allowed file type for PDFs?
      * Personally, PDF is what I prefer because its universal. I find the Microsoft extension on the file is problematic with interfacing with Apple stuff so I don’t have a problem with it.
* **Step 7 of 7: Review application**
  + What would you do at this point?
    - I would review because I would hate to have an application rejected because it was one number off. I likely would like to save my application for later because I don’t know how final this is
* **Confirmation**
  + What would you do at this point? I would print this page
  + When do you think you would get a decision? Probably within 2 months
  + Is there anything that would be helpful to see at this point once you've submitted? Maybe before “what happens after I apply” an expected timeline ? If its possible to have realistic timeline that floats based on that specific office.
  + *Have them click After You Apply link*
* **After you apply**
  + *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? Considering it’s a VA website, its very user friendly . Much better and cleaner than what I’ve used in the past on some of the VA websites. Straighforward and user friendly. I do like the informational stuff along the way that if you have questions like I had, I was able to see that I anticipated my question so I can find an answer and proceed. I liked it.
* 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? 5
* On a scale of 1 to 5, how mobile-friendly do you think it is? 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? I know the mindset of people in the state of grief, something maybe on the onset … not that I would change anything but really keep in mind that when people start to application you’re pulling their brain from many areas and trying to ease them into it and focus on one task at that particular moment. In that scenario that would’ve been easier to go through and relieved that it was easier to accomplish than I anticipated I would be.
  + How would you do things differently?
    - I may have missed terminology at the beginning , but if they were defined to get that persons brain to focus on who is who
* Is there anything else on your mind that we didn't ask?
* 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?