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

* **P9 – Aug 16**

**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]
  + Retired commander Us 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 I had a presentation with VA people to talk to us about VA burial benefits
* What do you think qualifies you to be buried in a national cemetery?
  + 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?
  + No
* 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?
  + No. Possibly interested

**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.
* **Applicant scrolled but wanted to click on the external links.** He stopped to read about Arlington National Cemetery and then at the supporting documents page. Click on “apply for pre-need”

“its good, especially the part that talks about the dependent children. That part right there was helpful because it talks about the disabled child.” “The only thing I recommend would be a link that says FAQs or additional information.”

*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**
  + What are your thoughts regarding the content on this page?
    - “The get help filing your claim link would be helpful” “I would add a question about when I click that link it’ll go to a state service veteran office or someone like that.”
  + Do you feel prepared to start applying?
    - *Things to watch for:*
      * Does the user feel the need to click on external links? Yes
      * 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?
        + Understood.
    - 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?
      * The veterans first name would be entered 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? “I guess some people would click on the link”
    - What are your thoughts regarding the available options? (should select Adult Dependent Son) “Maybe you could put other options and a disclaimer that says who is NOT qualified and put some examples.”
    - *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)?
  + **Applicant's mailing address**
    - *Things to watch for:*
      * How do users react with applicant address/contact page being moved to this new location? “You possibly could pre-fill the applicant details pre-filled from the veteran if it applies. If the recipient lives at the same address.”
* **Step 3 of 7: Sponsor information**
  + **Applicant's sponsor**
    - *Should select YES, that they're the sponsor here.*
    - Do they have any confusion with the sponsor terminology? “Do the pulldown menu what is a sponsor?” “Youre asking if the veteran is connected to the person getting the benefits.”
  + **Sponsor details**
    - What are your thoughts regarding whose details you'll need to provide here? [Should be their details as Sammy Smith]
      * I wouldn’t have any problem with it, the VA pretty much has everything.
    - *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**
    - *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?
    - Is there anything you would change?
      * “it’s pretty good with the prefer not to option that’s a good way to do it.”
    - *Things to watch for:*
      * How do users react to answering potentially sensitive questions? “Again the prefer not to option answer.”
      * How do they approach Other Category Comment field?
        + You could put an asterick by other and say what is the specific category that you had in mind or something like that. Explain further. You could also put if you check other, is it mandatory that you put an explanation in that box. 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?
      * Other is a little confusing, I would like to have more information on that. What is other? That pretty much covers it so maybe explain what other is.
    - 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 you as the sponsor or would you need to look them up?
      * It depends. I might have to go back and get that information. So here’s an example, sponsors military service number they might have to look that up. Most people it’s a social security number but if you’re a WW2 veteran it’s a different number.” “You want to say what that claim number is and is it a specific date? You need more information. If known, it might be optional. The claim number could be confusing for a lot of people.”
    - 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? Maybe you could put a pulldown menu. Does it include Space force, public health service, NNOA, etc
    - *Things to watch for:*
      * Would they be able to add multiple service periods for their sponsor?
        + Get rid of the extra branches of services . Rank would be like private sergeant those things. You could put pay grade. That example would be confusing and wrong.
      * Id have to go to my service records or DD214. What you might want to do at the bottom if you need assistance getting this information to contact the VA.
  + **Sponsor's previous name** -*Have them select YES*
    - *Things to watch for:*
      * Do they understand what this field is asking?
        + Oh I wouldn’t know how that would work. You might want to put a note if you check no, please contact a service member. To be honest I don’t know how that would work.
        + It could be a married woman or change your name Maybe a note if this applies to you, heres more information.
* **Step 5 of 7: Burial benefits**
  + **Previous Decedents**
    - Would you understand what this question is asking about the sponsor? This is the person you’re seeking burial benefits for.
    - *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 the applicant would like to be buried? I would say yes, here’s an idea on those pull down put in the location next to the cemetery. Put more information … transportation of the body and can you be buried anywhere you want and what is the criteria
    - 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? I don’t know with the information you gave me. Right up there in red I would put click here for supplemental files you should upload
    - What do you think you could provide to help your application process? If you’re sure that the VA already has it maybe you don’t need to add it. Maybe worst case they can call a benefits specialist.
    - 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**
  + What would you do at this point?
    - I like NEED HELP . I like that.
* **Confirmation**
  + What would you do at this point?
  + 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
  + *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? Needs some clarification in some places but keep in mind people finding their records and uploading their files, be generous and let them find 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? 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? Looks pretty good to me
  + How would you do things differently? It is self explanatory .. some people no matter what you did, some may just want to talk to somebody. Call a number and talk to someone.
* Is there anything else on your mind that we didn't ask? Nope!
* 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?